Florida Department of Transportation

Electronic Review Comments (ERC) System

User Manual

June 2017

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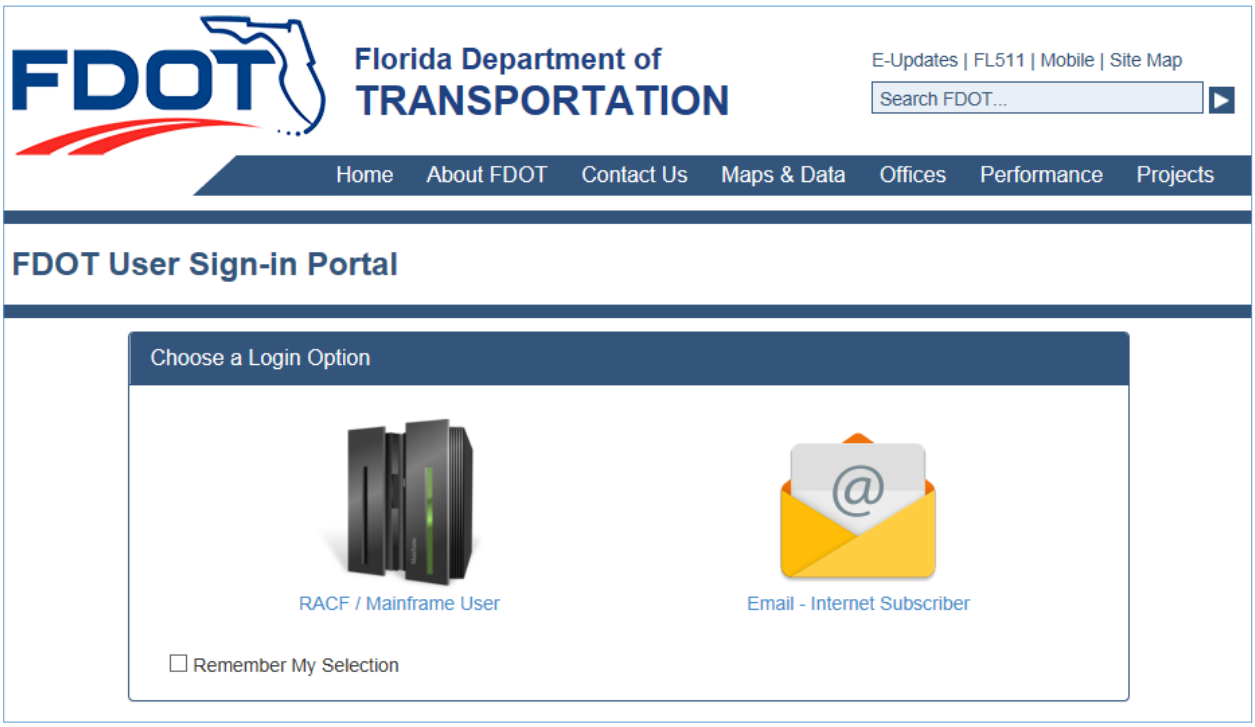
LOG IN

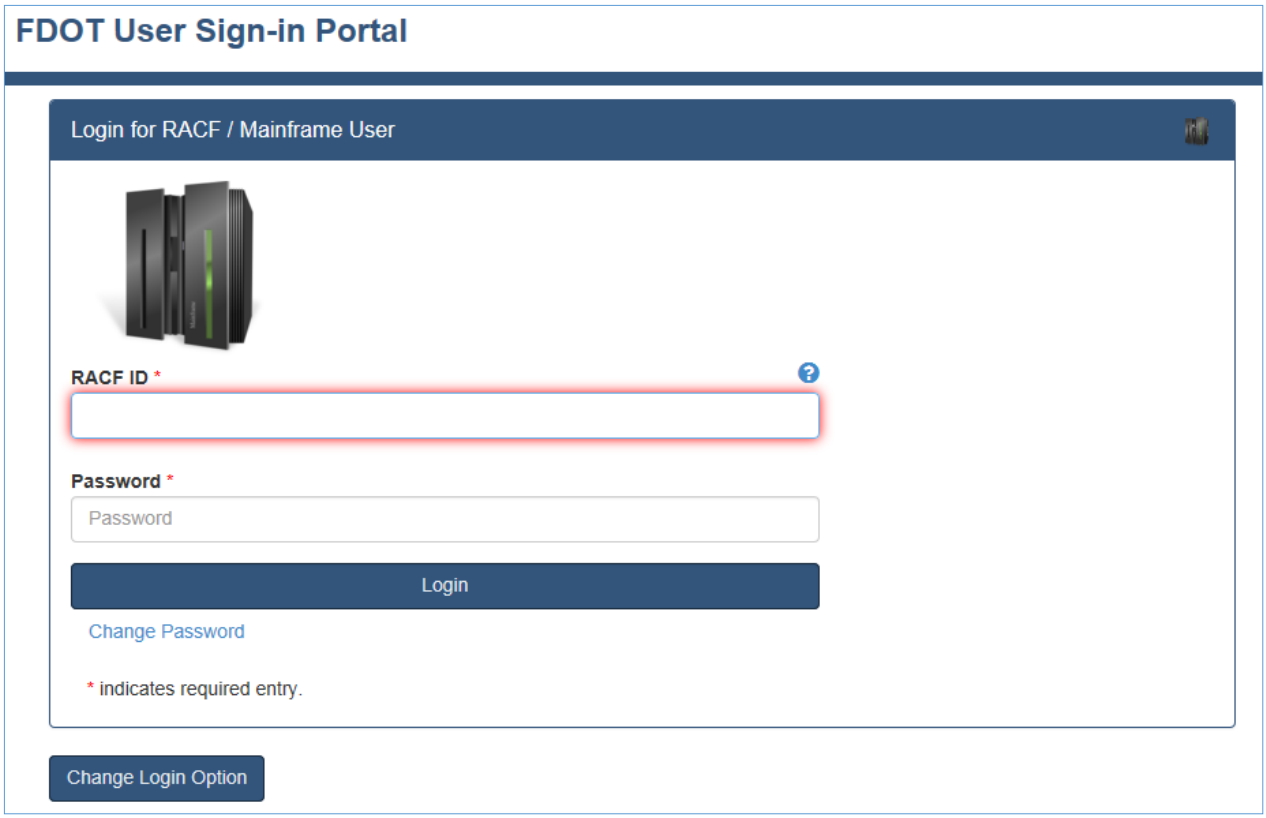
To login to ERC, open an internet browser window and go to the application web site address https://fdotwp1.dot.state.fl.us/ElectronicReviewComments. Log in screen will allow the user to select between the RACF / Mainframe User or Internet Subscriber Account (ISA). By clicking on the "**Remember My Selection**", the log in screen will be the one you pick.



RACF

Users can access the system with their RACF user id and password. RACF Id's are also used to access the mainframe and many enterprise applications such as CITS, LRE and RCI. For internal staff, if you do not know the password for your RACF account, or it has been revoked, please send an e-mail to the FDOT Service Desk (fdot.servicedesk@dot.state.fl.us). If you are an external consultant and do not know the password for your RACF account, please contact your FDOT Project Manager, as their authorization is required to reset your password.

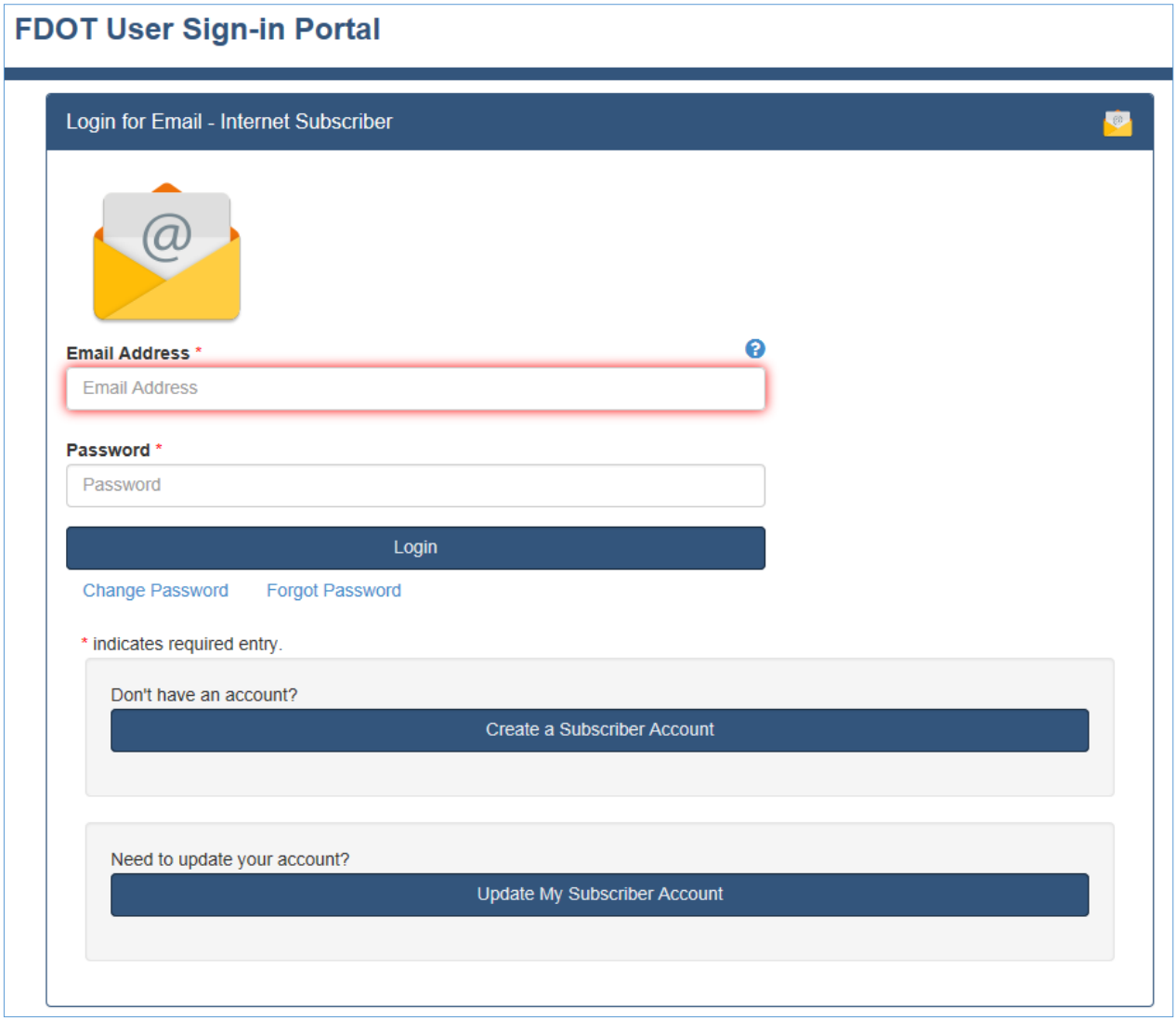
If an external consultant RACF user should need their account information updated – email, phone or company changes, they will need to contact their PM to authorize an ARRF request to have the account modified.



If the need arises for the user to switch to the ISA log in screen, click "**Change Login Option**".

Internet Subscriber Account (ISA)

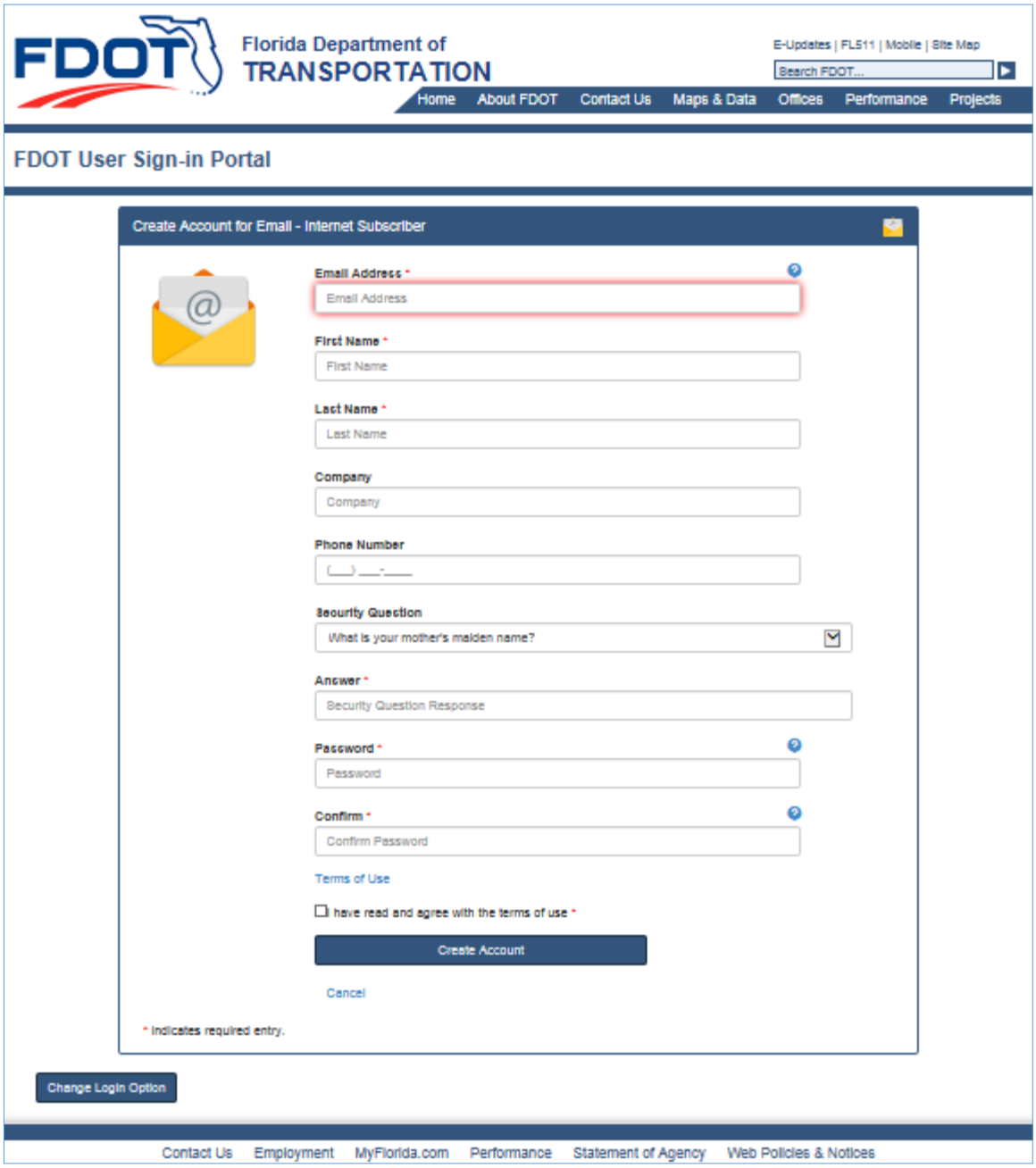
Users that do not have a RACF ID will need to use an Internet Subscriber Account (ISA) to access the system. If you do not have an existing ISA log-in, please click the '**Create a New Subscriber Account'** button on the FDOT Login Portal. The ISA log in screen appears below. This screen will allow the user to Change Password, Reset the password by clicking Forgot Password, create a New Subscriber Account if you do not have an ISA account and edit the data in your existing account by clicking Update My Subscriber Account.



If the user should need to update the information in the ISA account, example; changed companies, email address or phone numbers, you can access the ISA by going to the ERC log in screen and click on the '**Need to update an existing account**".

Creating an Internet Subscriber Account (ISA) Information

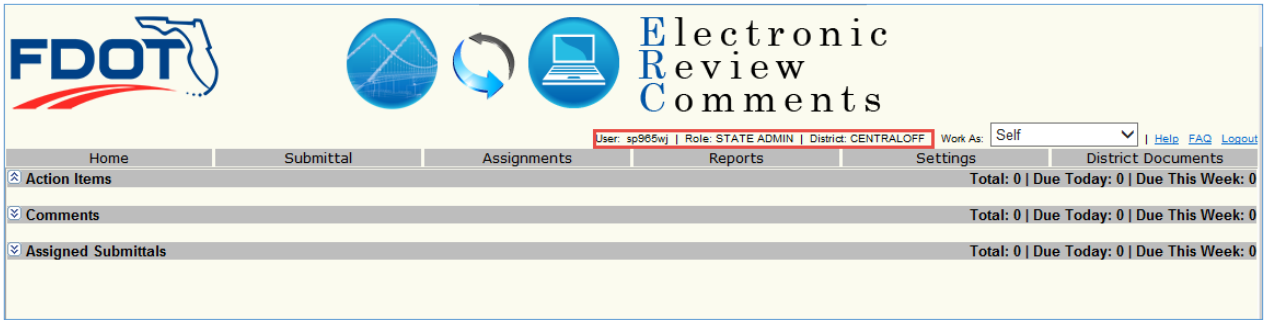
To create your ISA account information follow the instructions shown below.



Once created, an email will be generated back to you to verify the data that you submitted. Once you verify that data the ERC will be associated with your account which will allow the user to access the ERC system. If you still cannot access ERC email CO-ERC ISA Admin for them to add ERC to your account.

HOME PAGE

The user home page is shown below with the user information highlighted. The user can customize the home page by selecting which section is to be open upon accessing the home page; the Action Items, Comments or Assigned Submittals. To select the default section, select **Settings**, select **Home Screen Settings** and select the section.



Action Items Section

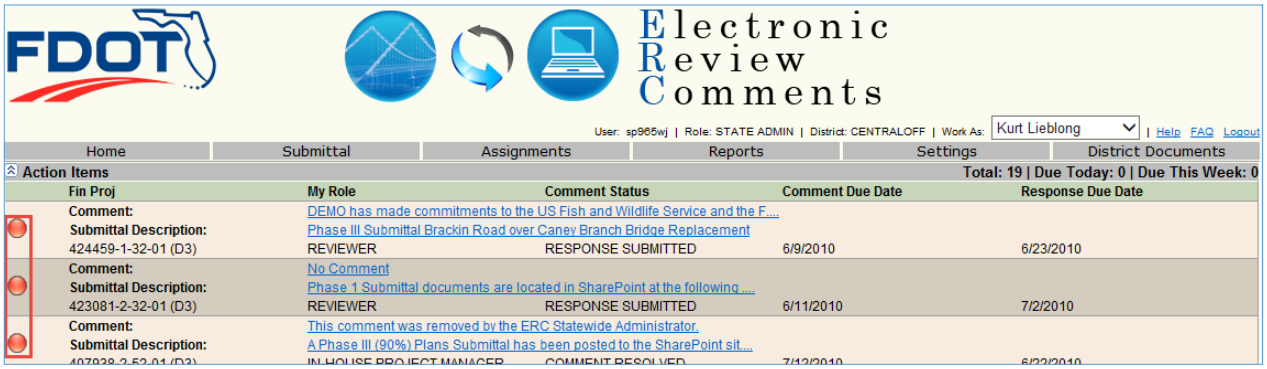
This section of the home page is a listing of active comments on a submittal that requires action from the user, either as an In-House PM, Consultant PM, Lead Reviewer, Reviewer, Lead Designer, or Designer. Once an action on the comment has been taken and the comment has been assigned to another user for further action, the comment will drop off of the user's action item list.

It is the responsibility of each user assigned to the submittal to keep the comments moving through their life cycle. If comments remain in your Action Items section then you are not insuring that the comments are resolve. Failing to not act on the Action Item comments, they will remain listed. Without completing every comment for a submittal, the submittal cannot be closed and submittal will remain listed under your Assigned Submittals.

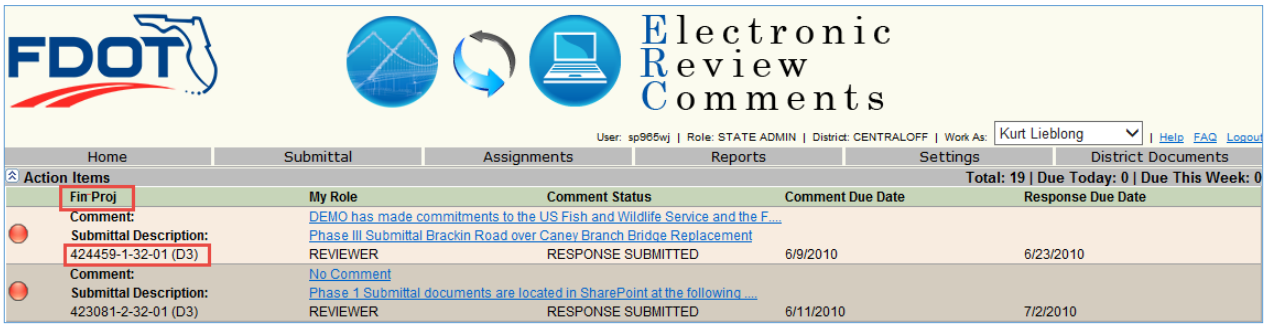
In the end, it is the responsibility of the In-House PM to step up to insure that all comments complete their life cycle to close the submittal. Any lingering comment that is not being acted on, they have the ability to Resolve them, thus closing the comment if an agreeable resolution is not foreseeable.

Some features of this section include:

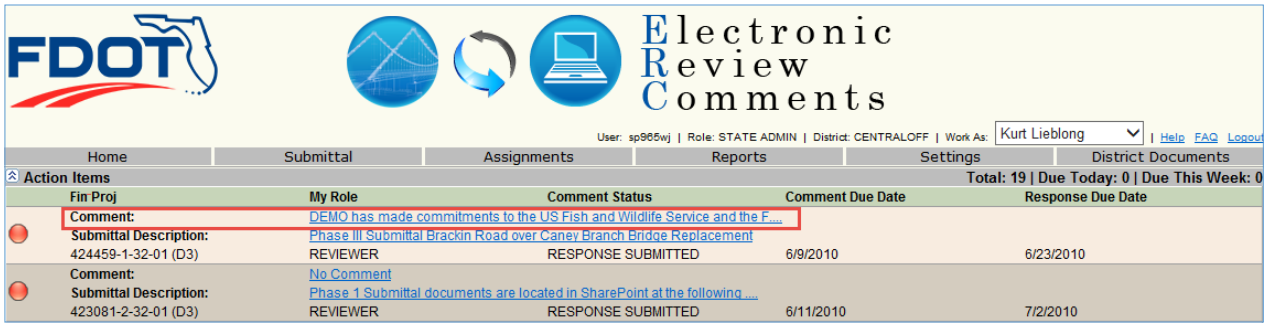
- Colored Buttons – These buttons can be green, yellow or red.
    - Green indicates that the comment due date is more than 1 week away.
    - Yellow indicates that the comment due date is within 1 week.
    - Red indicates that the comment due date has passed.



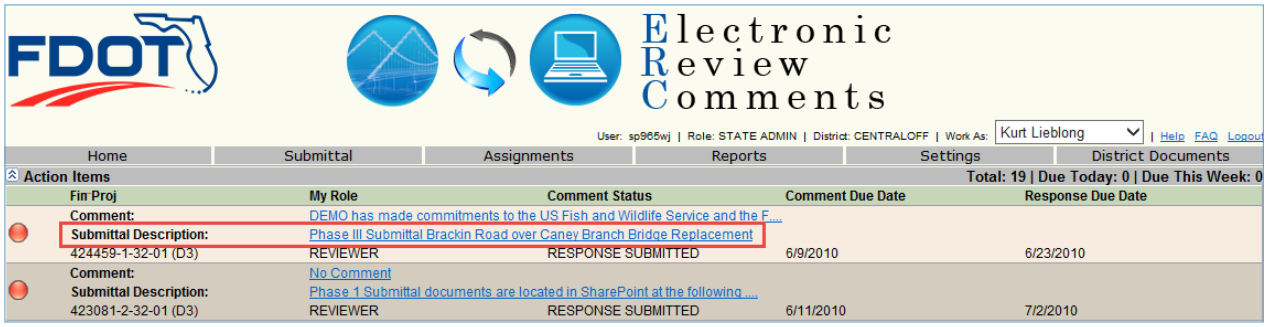
- Financial project numbers – Financial project numbers are not required.



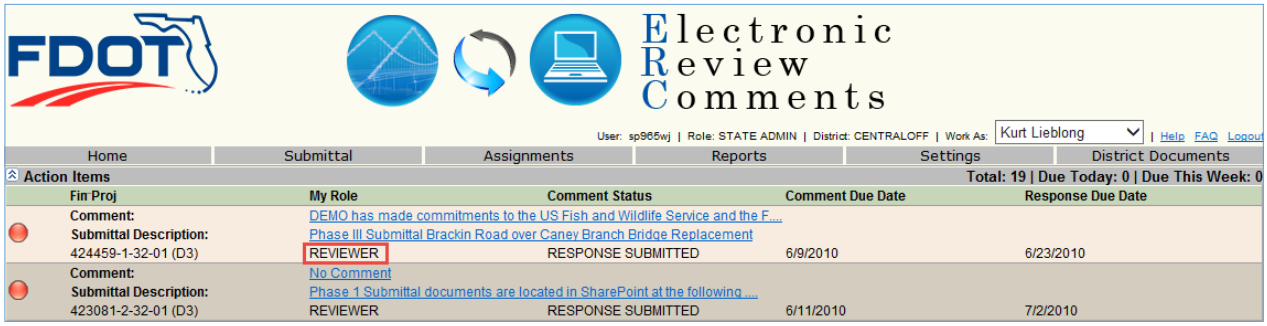
- Comment text – the first 75 characters of the comment text are displayed. The user can click the link to go to the comment page and see the comment in detail.



- Submittal Description – the first 75 characters of the submittal description are displayed. The user can click the link to go to the submittal information screen to see more detail.

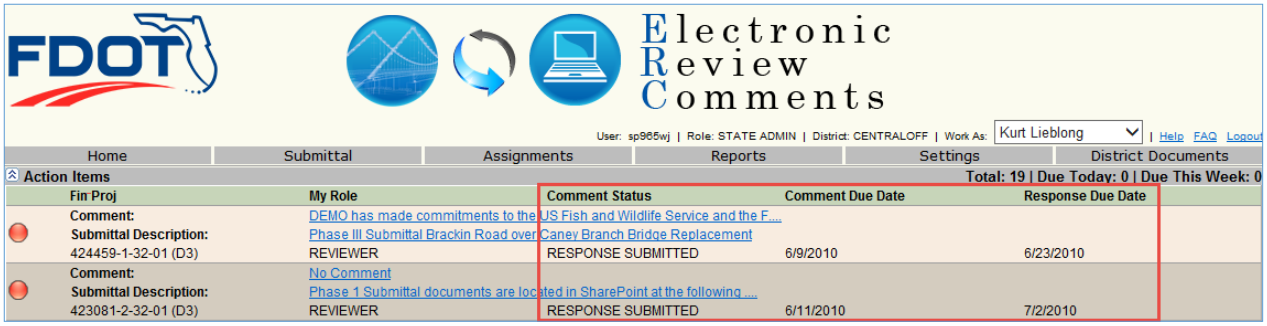


- My Role – The user's role on the described submittal is displayed.



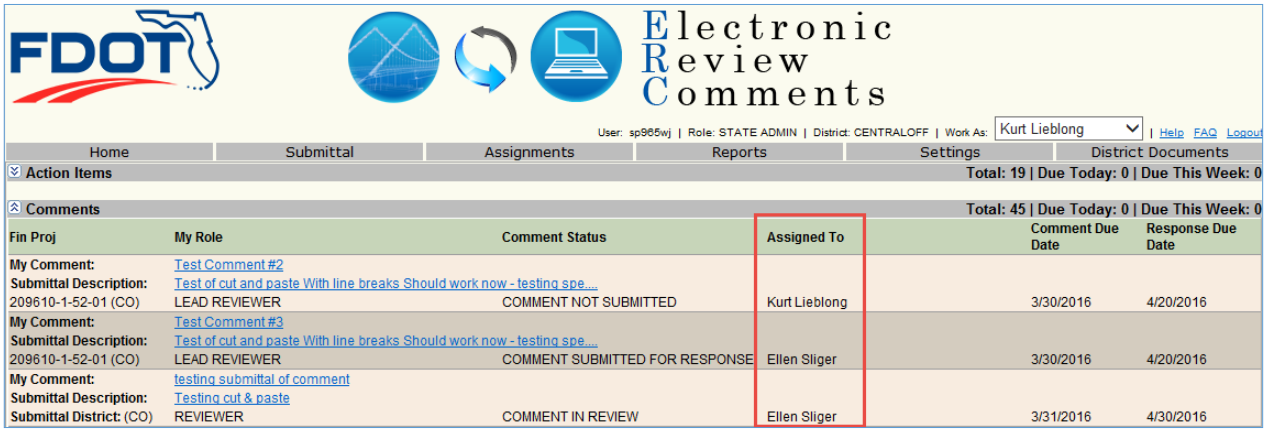
- Comment Status – displays current status of the comment
  - **Comment Not Submitted** – Reviewer has created the comment, but has **not** submitted the comment.
  - **Comment in Review** – Reviewer has created and submitted the comment, but it has not been submitted to the Designers for response. Comment is either waiting to be reviewed and submitted by Lead Reviewer or In-House Project Manager.
  - **Comment Submitted for Response** – Comment has been submitted to the Designers for response.
  - **Response in Review** – Response has been created, but has not been submitted to Reviewers.
  - **Response Submitted** – Response has been submitted to Reviewers.
  - **Response Accepted** – Submitted response was accepted by Reviewer.
  - **Comment Resolved** – In-House Project Manager has the ability to resolve a comment at any point in the review cycle. This should be used only if a resolution through the system does not seem possible.
  - **Comment Agreed With** – Comment submitted by Reviewer was agreed to by the Designer.
- Comment Due Date – displays the comment due date
- Response Due Date – displays the response due date

Items in this section are listed by the earliest comment due date.



Comments Section

This section of the home page lists all of the comments created by the user that are on an open submittal. Comments will drop off of this list when the submittal is closed. In addition to the fields that are also in the **'Action Items'** section, this section also displays who the comment is assigned to. Items in this section are listed by the earliest comment due date.



Assigned Submittals Section

This section lists all the open submittals assigned to the user. Submittals will drop off of this list when closed. Items in this section are listed by latest comment due date.

Colored Buttons – These buttons can be green, yellow, red, or blue.

For Reviewers:

- Green indicates that the comment due date is more than 1 week away.
- Yellow indicates that the comment due date is within 1 week.
- Red indicates that the comment due date has passed and no comments have been submitted.
- Blue indicates that at least one comment has been submitted or the 'No Comment' has been marked.

For Designers:

- Green indicates that the response due date is more than 1 week away.
- Yellow indicates that the response due date is within 1 week.
- Red indicates that the response due date has passed and no comments have been submitted.
- Blue indicates that the response due date has passed and three is nothing assigned to them for action.

FDOT
Electronic
Review
Comments
User: sp965ja | Role: STATE ADMIN | District: CENTRALOFF | Work As: Self | Help FAQ Logout
Home
Submittal
Assignments
Reports
Settings
District Documents
Action Items
Total: 26 | Due Today: 26 | Due This Week: 0
Comments
Total: 67 | Due Today: 67 | Due This Week: 0
Assigned Submittals
Total: 86 | Due Today: 85 | Due This Week: 0
Fin Proj
Phase
My Role
Comment Due Date
Response Due Date
Comments Submitted
Walter's Test Submittal: Roles Jeff Porter - Primevera Scheduler Kurt Li...
213113-1
PHASE III
IN-HOUSE PROJECT MANAGER
7/18/2012
8/18/2012
0
Testing notifications
FINAL
CONSULTANT PROJECT MANAGER
6/21/2012
6/22/2012
NA
Test of cut and paste With line breaks Should work now - testing spell c...
209610-1-52-01
FINAL
LEAD REVIEWER
3/1/2012
3/30/2012
9
Testing cut & paste
FINAL
REVIEWER
10/13/2011
10/14/2011
3

CREATING A NEW SUBMITTAL

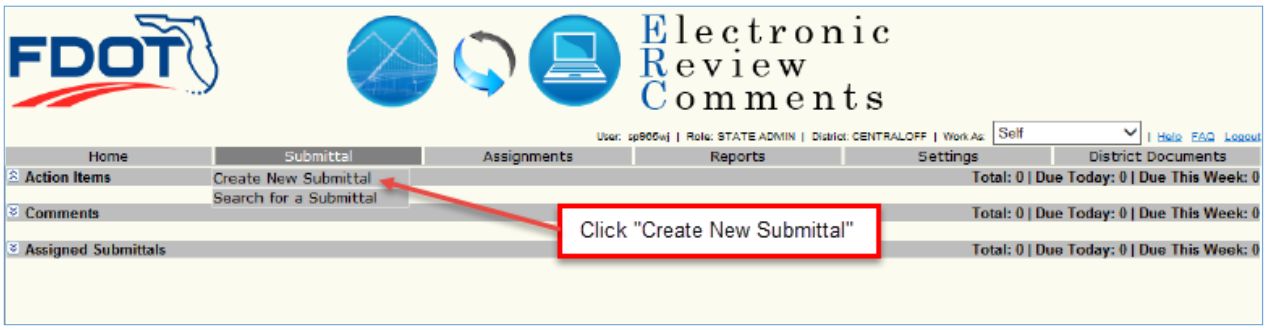
Submittals can only be created by the District Administrators and users that have been given permission by the district to create submittals: In-House PMs and Submittal Creators. If the '**Create New Submittal'** option is disabled then the user does not have permission to create submittals.

There are a number of methods by which an In-House PM can manage a submittal to respond to comments by reviewers.

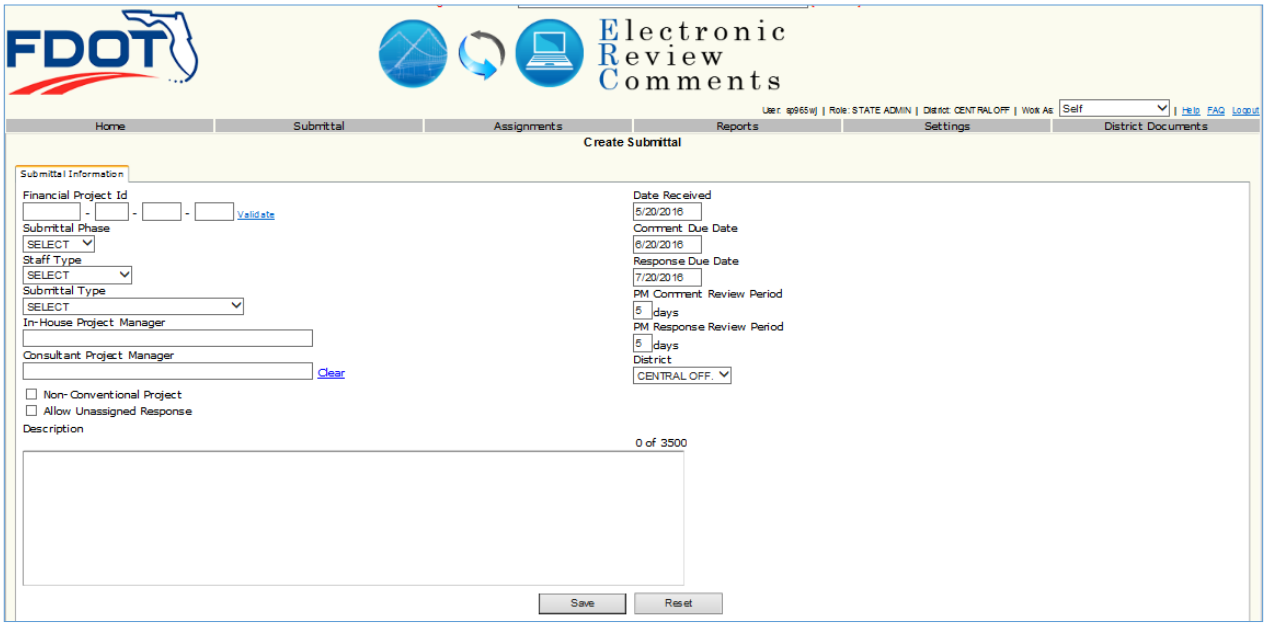
- In House PM as the lead in responding to comments from reviewers
- In-House PM with Lead Designers and Designer responding to comments from reviewers
- In-House PM with a Consultant PM responding to comments from reviewers
- In-House PM / Consultant PM with Lead Designers and Designers responding to comments from reviewers.

The In-House PM can respond to comments themselves, have Lead Designers and/or Designers respond to comments or have a Consultant PM manage the submittal comment response process by themselves or by the use of Lead Designers and/or Designers. When the submittal is created the In-House PM or the Submittal Creator will already know which method to develop. When the Consultant PM is utilized they will assign the Lead Designers and Designer as needed.

To create a new submittal, select '**Create New Submittal'** under the Submittal heading.



The Create Submittal page will open.

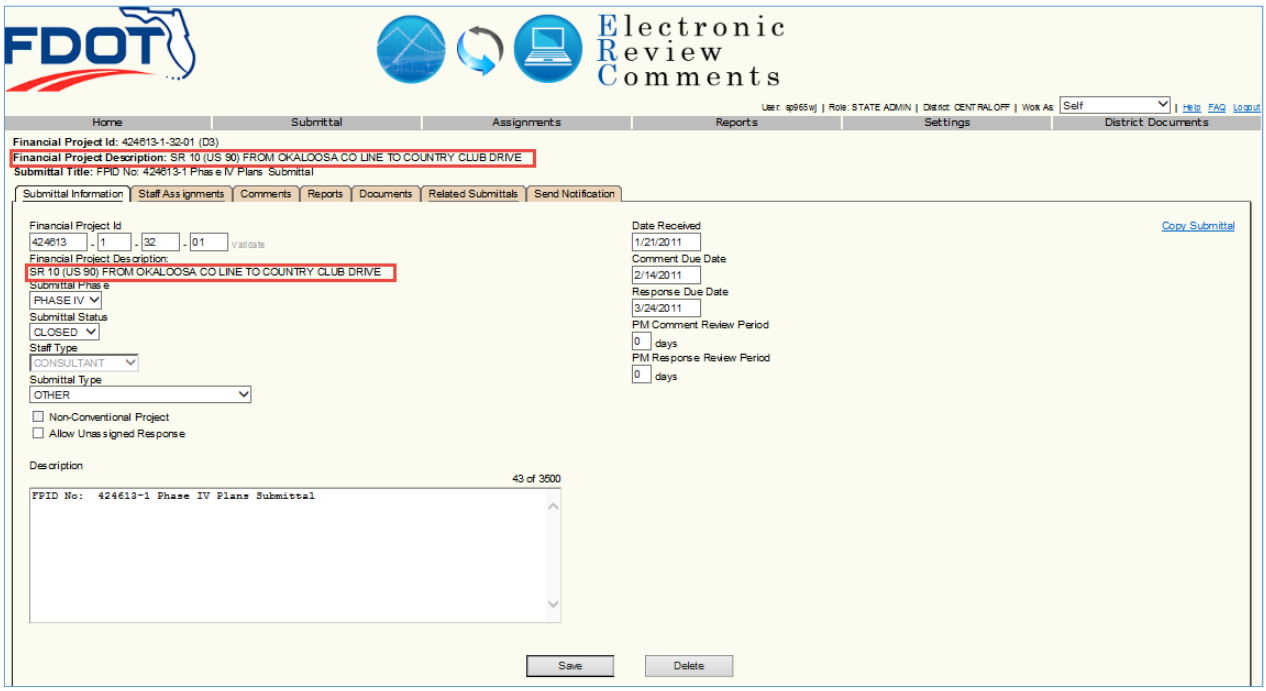


Enter the following information:

- **Financial Project ID:** This is not a required field, but if entered and validated the Financial Project Description from the FM system will be pulled into ERC and displayed. The system can validate the number by the first 7 digits or all 11 digits of the FPID #. The number must be established in work program for the number to validate. For example, if the project is established in the work program, but the phase has not been established the number can be validated by the first 7 digits.
- **Submittal Phase:** Select from the dropdown.
- **Staff Type:** Select from the dropdown **(Required)**
- **Submittal Type:** Select from the dropdown **(Required)**
- **In-House Project Manager:** Begin typing name and select from returned list **(Required)**
- **Consultant Project Manager:** Begin typing name and select from returned list **(Required for Consultant Staff Type)**
- **Date Received:** Enter date submittal is received. Defaults to current date.
- **Comment Due Date:** Enter date comments are due. Defaults to 1 month after Date Received.
- **Response Due date:** Enter date responses are due. Defaults to 1 month after Comment Due Date.
- **PM Comment Review Period:** This feature is used to hold comments until the In-house PM reviews. Referred to as the grace period in old ERC System. This can be set per submittal and the District has the option of setting a default setting on the District Default Setting Page.
- **PM Response Review Period:** This feature is used to hold responses until the In-house PM reviews. Referred to as the grace period in old ERC System. This can be set per submittal and the District has the option of setting a default setting on the District Default Setting Page.
- **District:** The District field will default to your respective District. If you are assigned to more than one District, please click the drop down to select the required District to which you are creating a new Submittal.
- **Non-Conventional Project:** Provides two text boxes for a comment to be entered – "Response Required Comment" and "FYI Comment." A comment can only be entered into one text box. If a

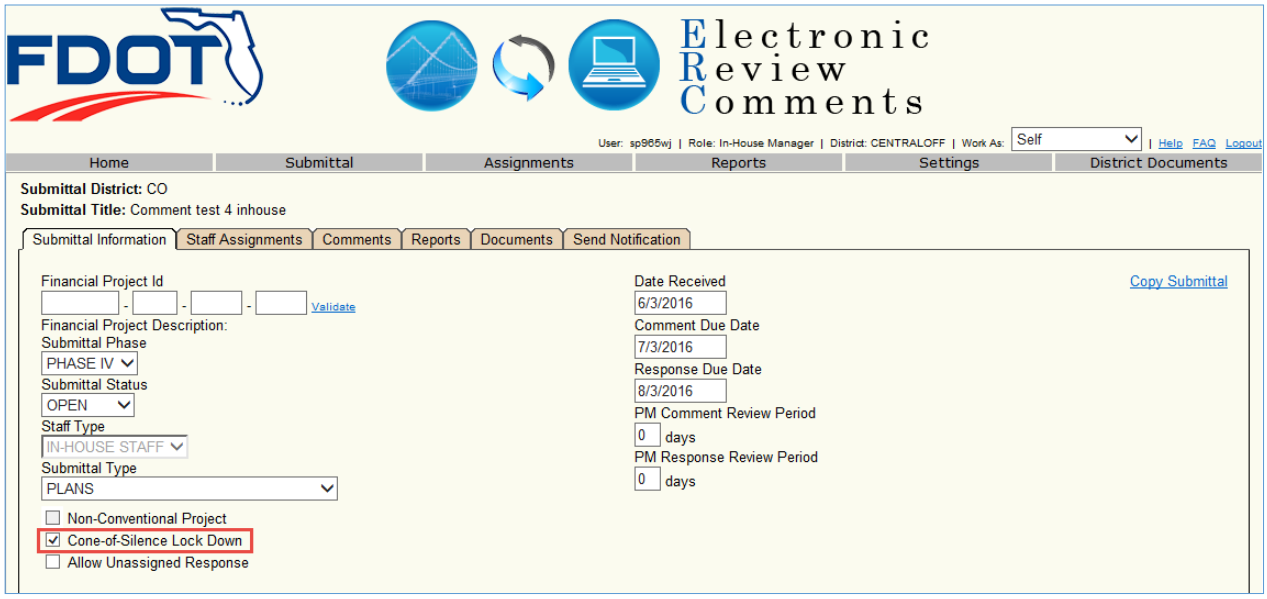
comment is entered into the “Response Required Comment” text box, then the PPM required language “A written response is required” will be appended to the end of the user’s comment. If a comment is entered into the “FYI Comment” text box, then the PPM required language, ”This comment is for information only, A written response is not required” will be appended to the end of the user’s comment. Typically this applies to design build type projects.

- **Allow Unassigned Responses:** This will allow any designer assigned to a submittal the ability to respond to any comment that is assigned to the consultant project manager for consultant type submittals and the in-house project manager for the in-house type submittals. Once the designer saves a response, the comment will be assigned to that designer. Using this feature, the designers will pick the comments to respond to without the PM assigning the comment or the comment being transferred by category. This feature can be set as a District Default setting.
- **Description:** Enter the submittal description **(Required).** The first 50 characters of the description will become the **Submittal Description** on the Home Page and submittal details page.

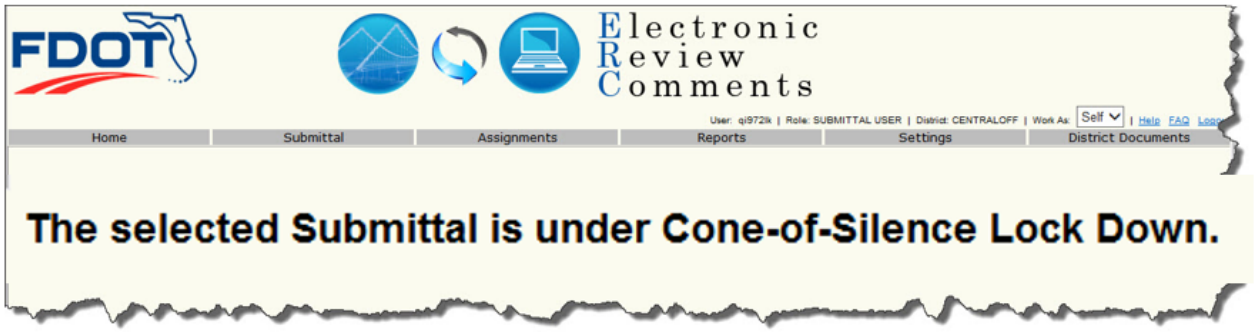


The Financial Project Description is returned from the FM System when the submittal is saved.

- **Cone of Silence Lock Down**: When necessary the District Administrator can set the ‘Default Setting’ to ‘Allow Submittal Lock Down’. When applied a new check box will appear on the Submittal Information tab, that the District Administrator or In-House PM can select. If the ‘Cone of Silence Lock Down’ is checked unassigned users will not be able to see the submittal. If an unassigned user attempts to view the submittal ERC will respond back ‘The Selected Submittal is under Cone-of-Silence Lock Down’. The submittal will not exhibit any information. Only those assigned to the submittal will be able to view the documents, comments and responses. Submittals will also include an end-date for the lock-down. Only the District Administrator or In-House PM will be able to edit this field. When the current date is after the lock-down expiration date or the District Administrator or In-House PM unchecks the box on the Submittal Information tab, the lock-down rules are removed. The submittal will then be viewable to others.



If an unassigned user clicks on the submittal, the following screen will appear.

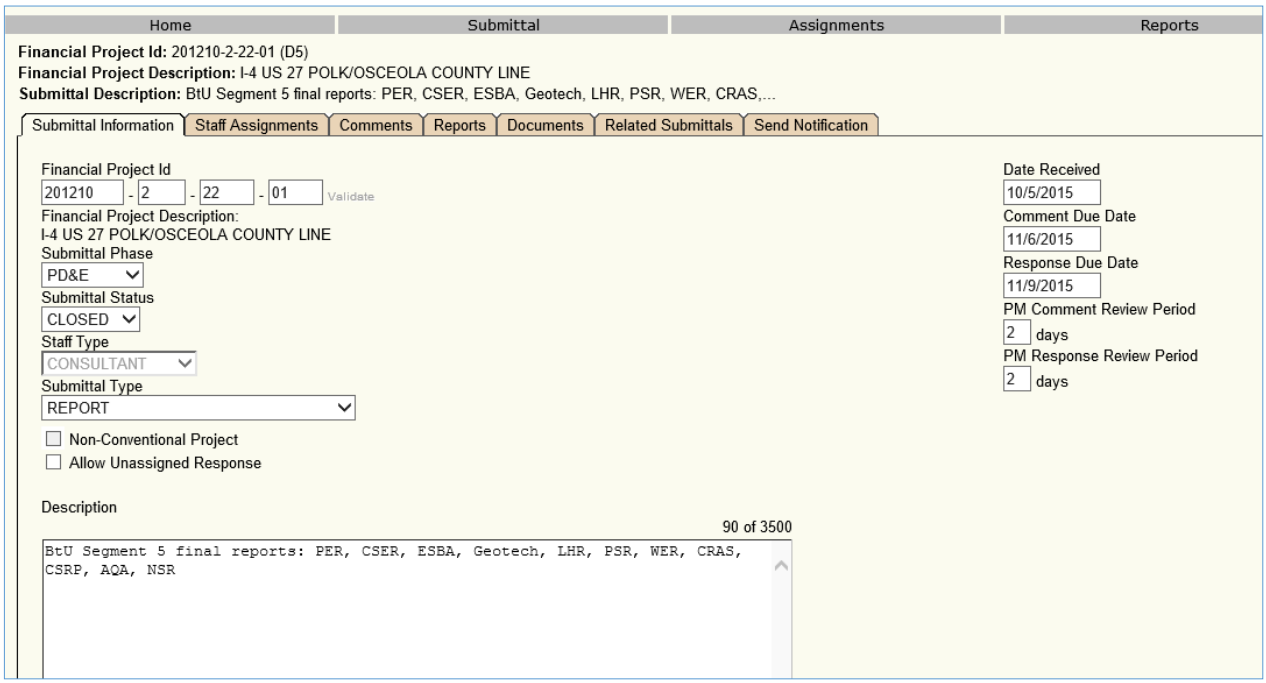


Submittal Screens

When accessing the submittal the display will provide access to:

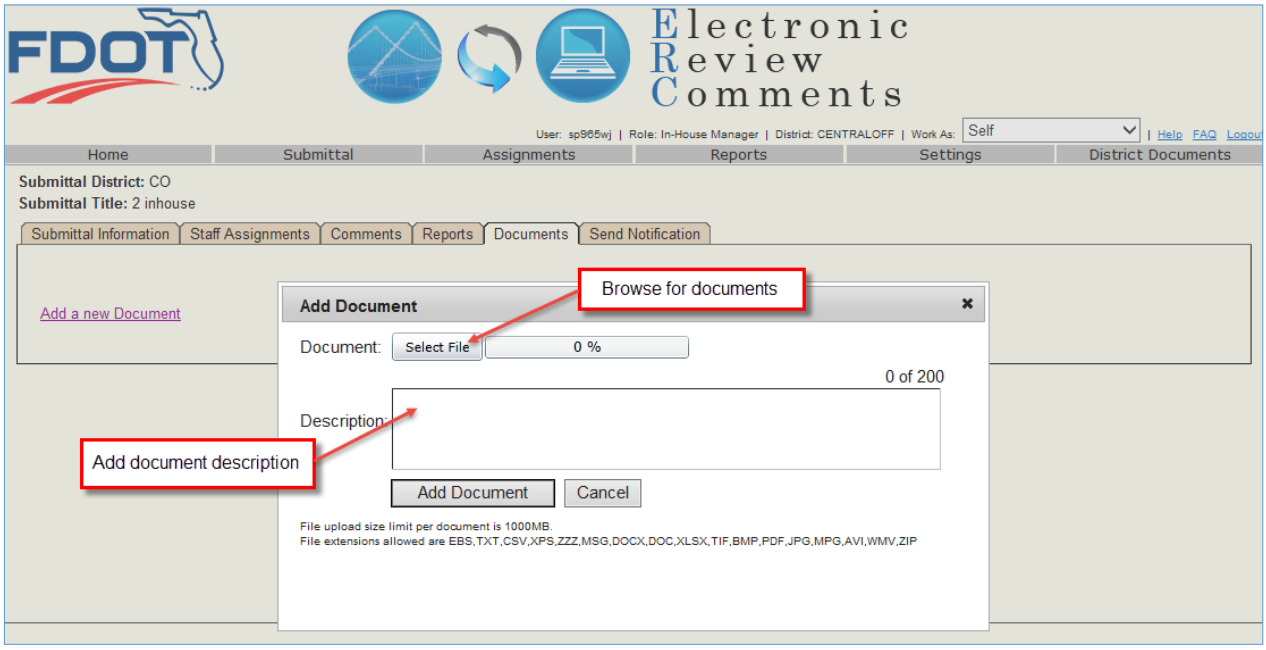
- **Submittal Information** - view provides project data, the comments due date and when comment responses are due
- **Staff Assignments** - Provides information relative to the In House Project and Consultant project managers, lead reviewers and reviewer identities
- **Comments** - Provides access to creating new comments, the review of comments by individuals or by category
- **Reports** - Provides access to generating reports relative to the submittal comments
- **Documents** - Provides access to the project submittal documents
- **Related Submittals** – If more than one submittal shares the Financial Project Id. The Related Submittals tab will be available, which will allow access to other related submittals based on the Financial Project number.
- **Send Notification**, option only available to the assigned In-House PM, District Administrators and/or District Submittal Creators – Within the submittal, create a “send to” email notification option based on those assigned to the submittal. This will open a new screen that allows the user

to enter the subject and text of the message. The message will be sent by the server using the existing email notification system. The notification will be addressed to all of the assignees on the submittal including the sender. The email will not be saved in the ERC system.

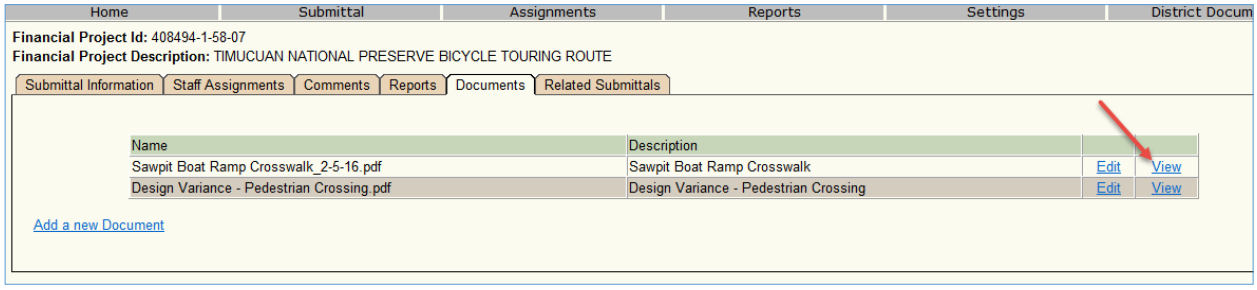


Project Submittal Documents

By selecting the Documents tab the staff who are assigned to the submittal will have access to the submittal documents for review. When creating a new submittal the District Administrator, In-House PM and/or the Consultant PM will have the ability to upload the submittal documents into ERC. By selecting the '**Add a new Document'** a dialog box will open. To upload a document select the '**Select File'** and a web browser will open for the search of the specific file, select the file. Enter a document description in the Description box and select '**Add Document'** to upload the document into the ERC.

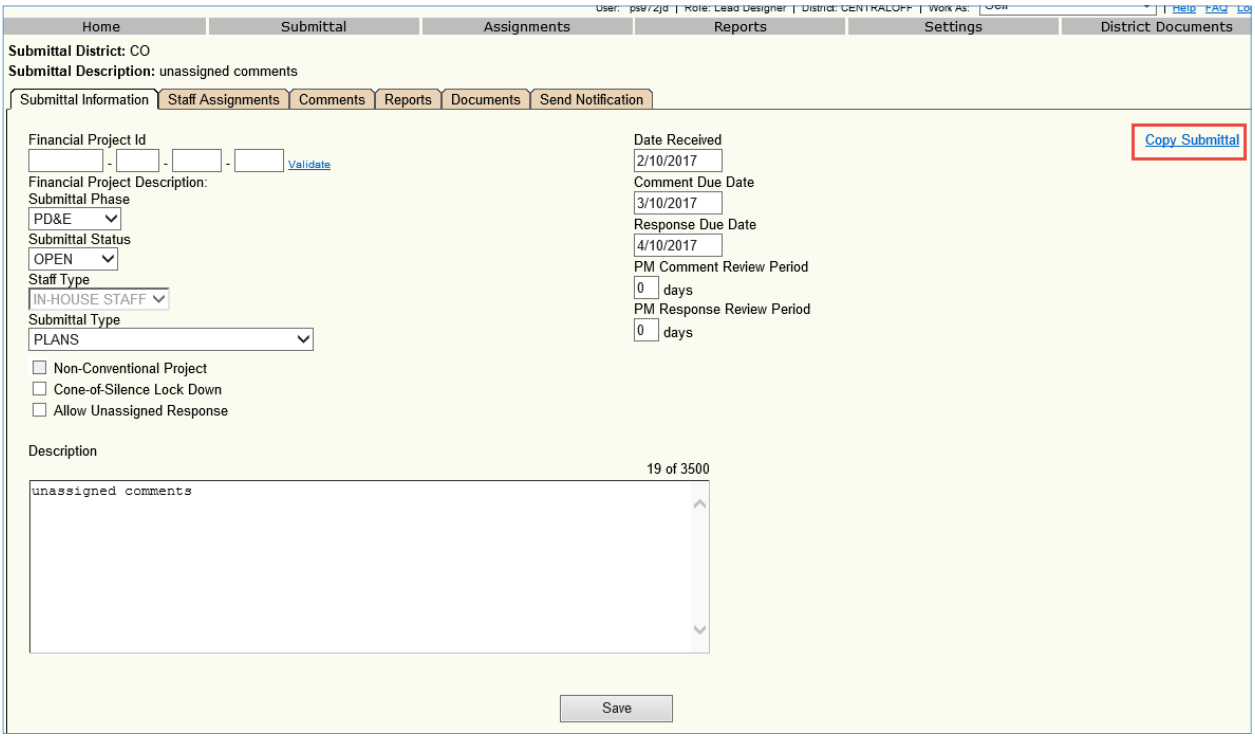


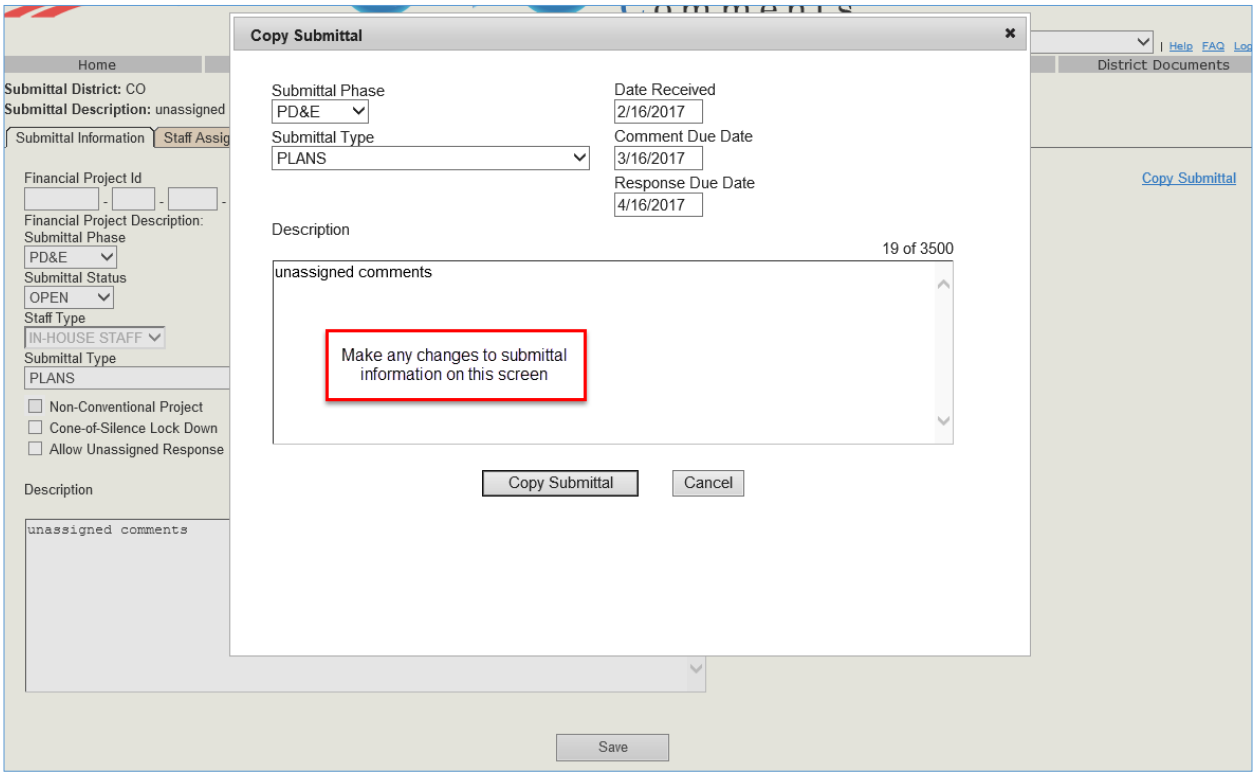
Staff assigned to the project will have access to the documents by clicking on the selected document '**View**' tab. The assigned staff can then be able to download the document for review. Assigned staff can then select the '**Comments**' tab to enter comments.



Creating Additional Submittals

District Administrators and Submittal Creators have a screen option "Copy Submittal" button that all other users will not see on their Submittal Information screen. To create an additional submittal that would utilize the same Financial Project Id, Staff Type, Project Managers, Designers, and Reviewers without having to re-enter the same basic submittal information, go to the Submittal Information screen on the original submittal and select the '**Copy Submittal'** link in the top right corner, where a copy submittal edit screen will appear.


Home
Submittal
Assignments
Reports
Settings
District Documents
Submittal District: CO
Submittal Description: unassigned comments
Submittal Information
Staff Assignments
Comments
Reports
Documents
Send Notification
Copy Submittal
Financial Project Id
Validate
Financial Project Description:
Submittal Phase
PD&E
Submittal Status
OPEN
Staff Type
IN-HOUSE STAFF
Submittal Type
PLANS
Non-Conventional Project
Cone-of-Silence Lock Down
Allow Unassigned Response
Date Received
2/10/2017
Comment Due Date
3/10/2017
Response Due Date
4/10/2017
PM Comment Review Period
0 days
PM Response Review Period
0 days
Description
19 of 3500
unassigned comments
Save


Copy Submittal
Submittal Phase
PD&E
Submittal Type
PLANS
Date Received
2/16/2017
Comment Due Date
3/16/2017
Response Due Date
4/16/2017
Description
19 of 3500
unassigned comments
Make any changes to submittal information on this screen
Copy Submittal
Cancel
Save

Make any changes to the submittal information and select the '**Copy Submittal'** button. The submittal dates will be prepopulated and if additional or less time is require those dates can be modified. A new submittal will be created based on the previous submittal information and any information changed on the Copy Submittal screen. Coping the submittal will also copy over those who were assigned to the original submittal.

Upon selecting the Copy Submittal button an email notification will be sent to all assigned to the new submittal. Once the submittal has been saved select the **Staff Assignments** tab to change the Project Managers and to assign additional Reviewers and Designers or remove those that are not needed. Staff can be assigned by using an established staff assignment default list or individually. When the new submittal was copied the documents associated with the original will not be carried forward, you will need to add new documents to the submittal.

If the need arises the District Administrator can change the Staff Type (In-House Staff vs Consultant) within the submittal if no comments have been made. When this occurs an automatic email will be sent to the appropriate PM (In-House or Consultant) "You have been ADDED or REMOVED as a Consultant Project Manager for the following submittal"

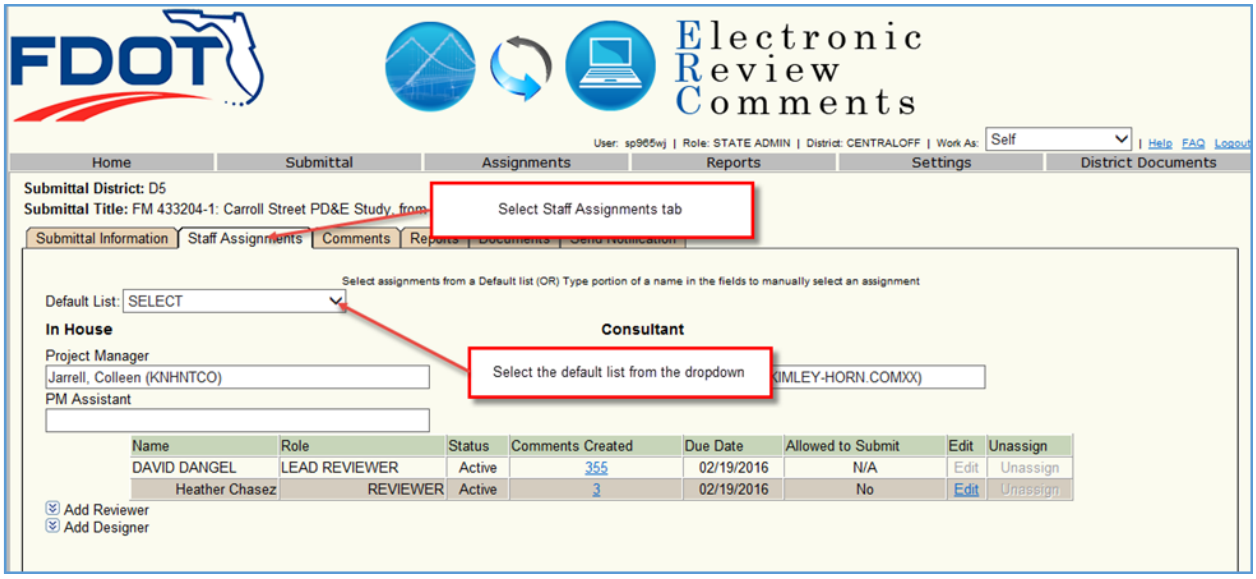
STAFF ASSIGNMENTS

Once the submittal is created, select the Staff Assignment tab to assign the project managers, reviewers and designers. Staff can be assigned by using an established staff assignment default list or individually. ***Staff can only have one role per submittal.***

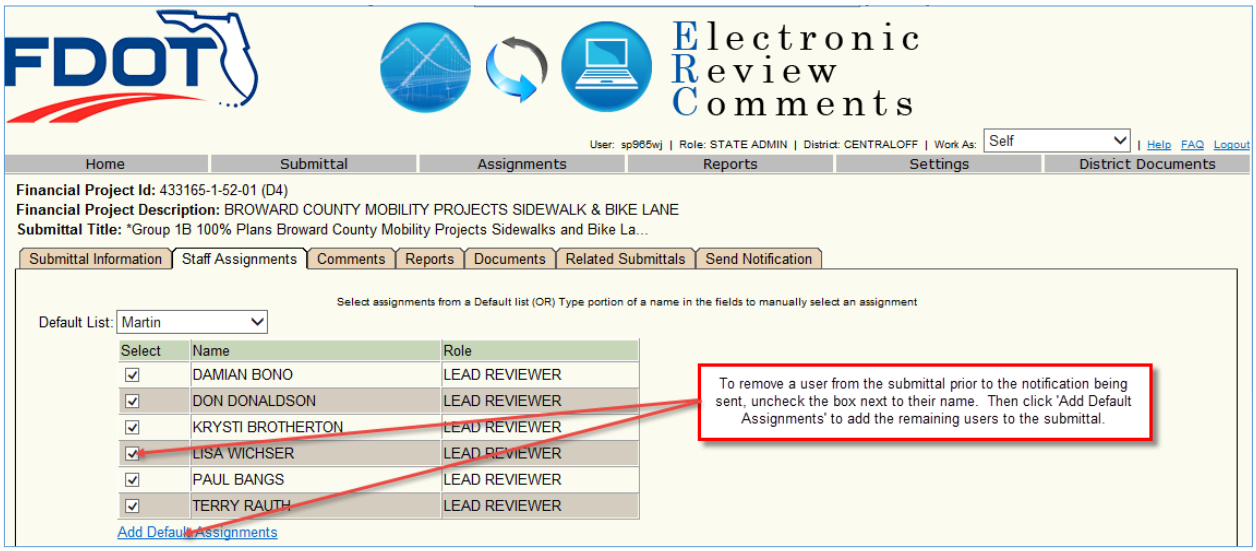
Default List

A Default list is a preassembled list of staff that can be assigned to a submittal. A District may have a wide variety of default lists to use depending on the submittal phase and type. The District may also have a default list for each different user group that may be required to review the documents depending on the location of the project within the District. The District maintains these lists as staff changes and as new players are directed to participate in the review of projects.

To assign staff using a default list, select the default list from the dropdown. Staff listed on the default list will automatically populate when the required field is selected. You can select all staff or choose the required staff to the submittal form the displayed default staff list.



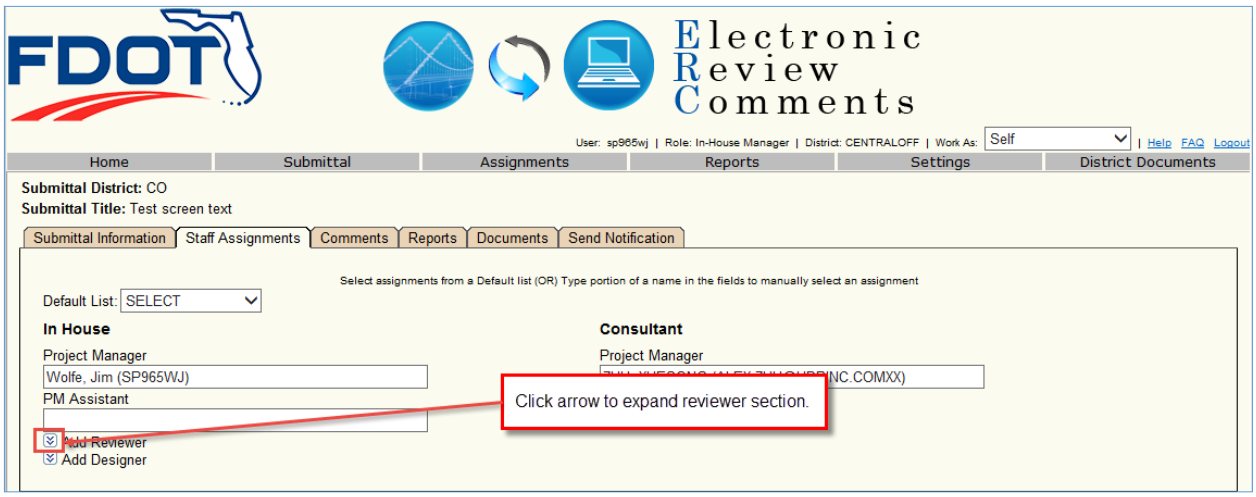
Remove any users from the default list by unchecking the box next to their name and select the '**Add Default Assignments'** link to add the remaining users to the submittal and the ERC will generate the notification e-mail to those users who have been assigned to the submittal.

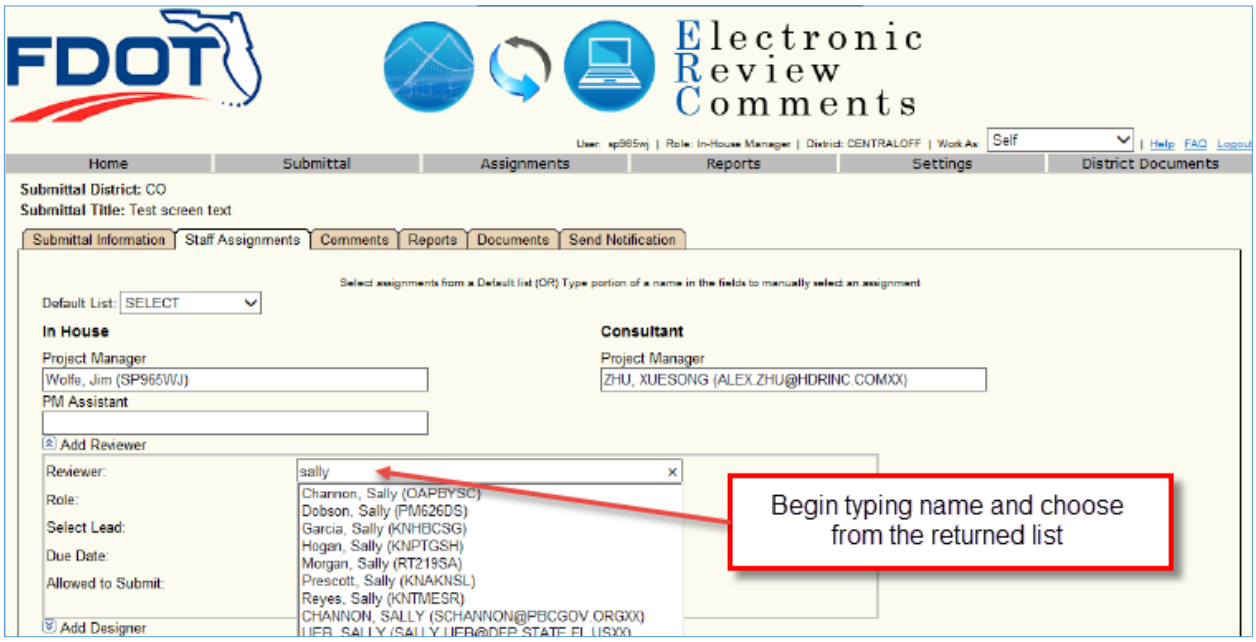


The Submittal Creator and District Administrator can add additional staff (Reviewers and Designers) to the submittal by using other District Default Lists following the same procedures as described above or they can add staff individually. The use of other Default Lists will append the assignment list. The In-House PM can add Reviewers and Designers by the use of the Add Reviewer and Designer tabs. The Consultant PM can only add Designers to the submittal by way of the Add Designer tab. To add individual staff to the submittal see **Individual Reviewer Assignments.**

Individual Reviewer Assignments

Reviewers can be assigned individually without using a default list. Once the submittal is created, select the **'Staff Assignments'** tab to go to assignment page. Expand the reviewer section clicking on the arrows next to **'Add Reviewer'.** Place the cursor in the **'Reviewer'** text box and begin typing the staff name. A list of names will be returned and the user selects the appropriate staff.





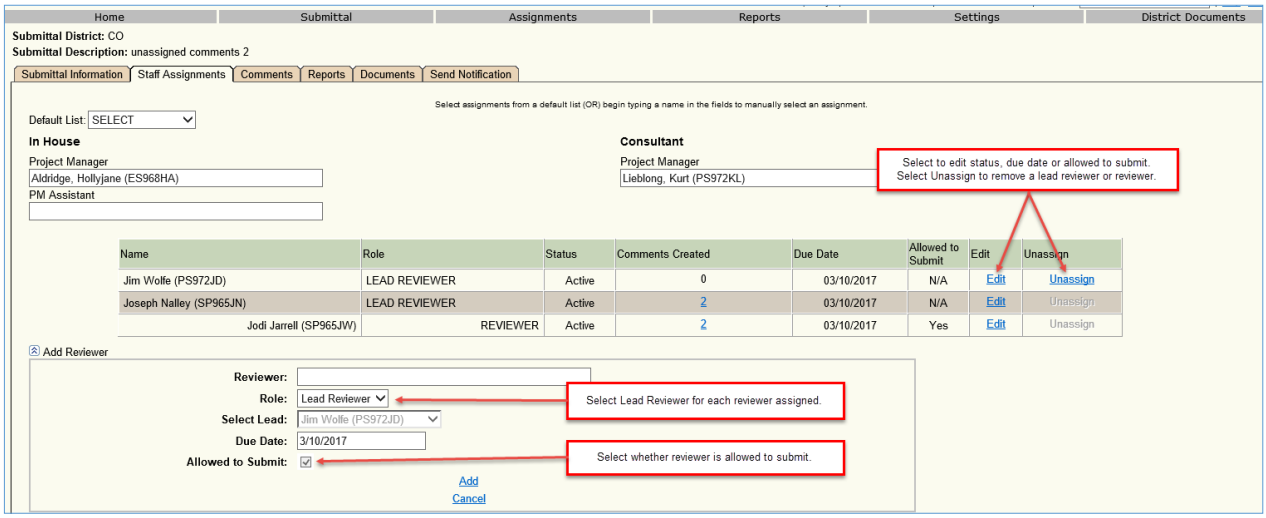
The initial reviewer assigned must be a lead reviewer. Modify the comment due date if necessary and click the **'Add'** hyperlink to add the lead reviewer. Clicking the **'Add'** hyperlink will add the lead reviewer and send an e-mail notifying the reviewer they have been added to the submittal.

Reviewers can be assigned to each Lead Reviewer. When assigning Reviewers, select the Lead Reviewer and select whether a reviewer is **'Allowed to Submit'.** The **'Allowed to Submit'** checkbox allows the Reviewer to submit their comments without having to be reviewed and submitted by their Lead Reviewer. Lead reviewers are always allowed to submit their own comments. District Administrators and In-House PMs can assign any due date to Lead Reviewers and Reviewers, different from the global submittal

Comment Due Date. A Lead Reviewer cannot add another Lead Reviewer. Lead Reviewers can assign Reviewers to the submittal on or before the global submittal due date.

Once reviewers are added to a submittal the following fields can be edited:

- Status – lead reviewers or reviewers can be made Inactive.
- Due Date – a lead reviewer or reviewer's comment due date can be extended.
- Allowed to Submit – This field can only be changed for reviewers. See description above.

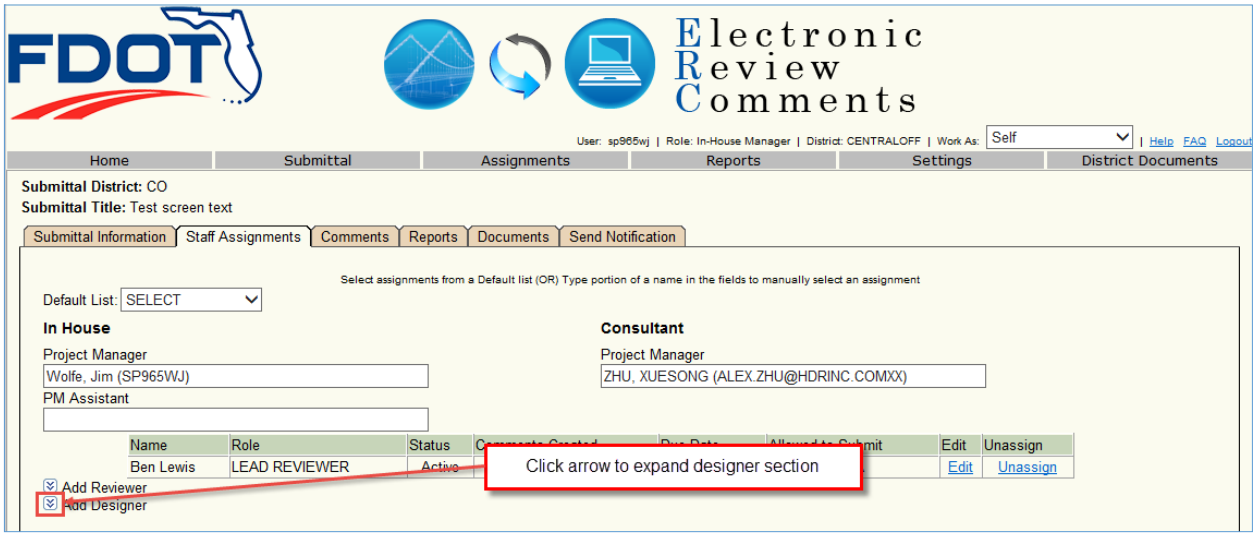


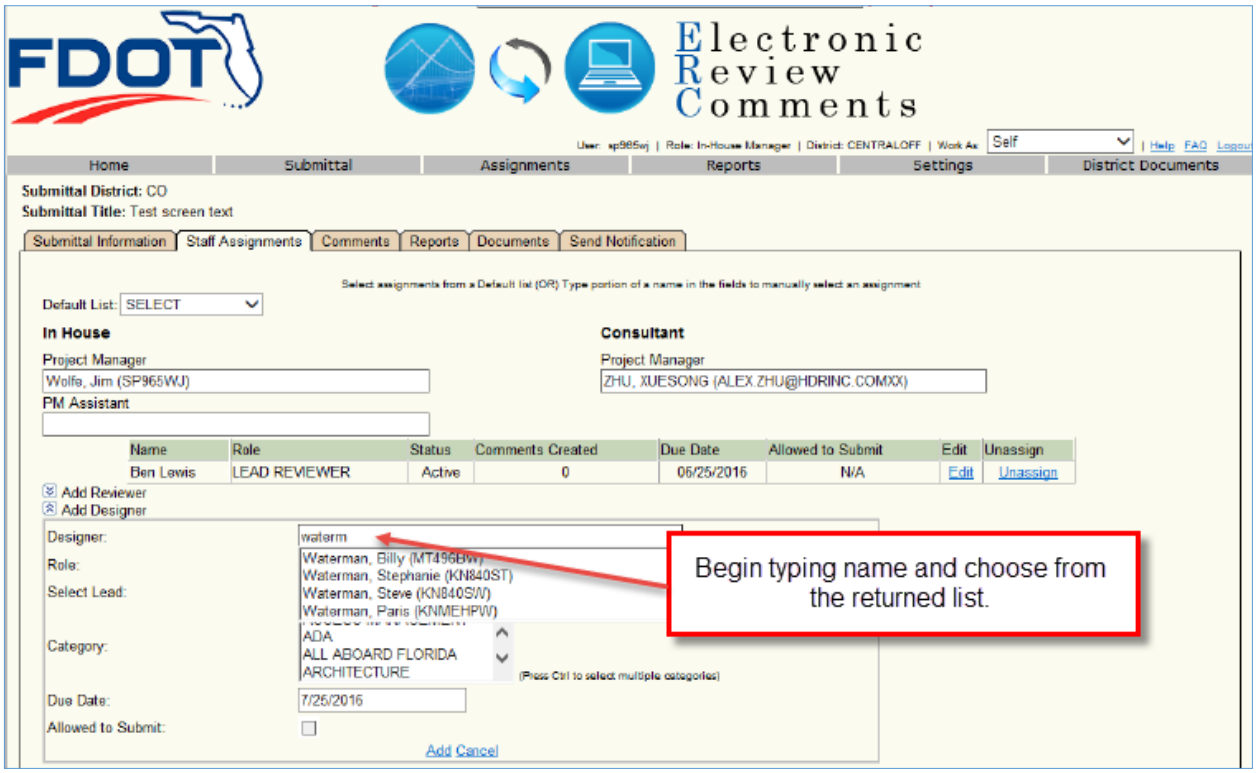
Reviewers can also be unassigned by clicking the **'Unassign'** hyperlink**.** Clicking this link will remove the lead reviewer or reviewer from the submittal and send them an e-mail notification. Lead Reviewers cannot be unassigned if they have reviewers assigned to them. Lead Reviewers or Reviewers cannot be unassigned if they have previously made comments. The **'Unassign'** hyperlink will be grayed out showing this is not an option. Only a District Administrator or the In-House PM can remove a Lead Reviewer from a submittal. .

Under Staff Assignment, only the District Administrator can change the In-House PM and Consultant PM assignments. The In-House PM can change the Consultant PM assignment.

Individual Designer Assignments

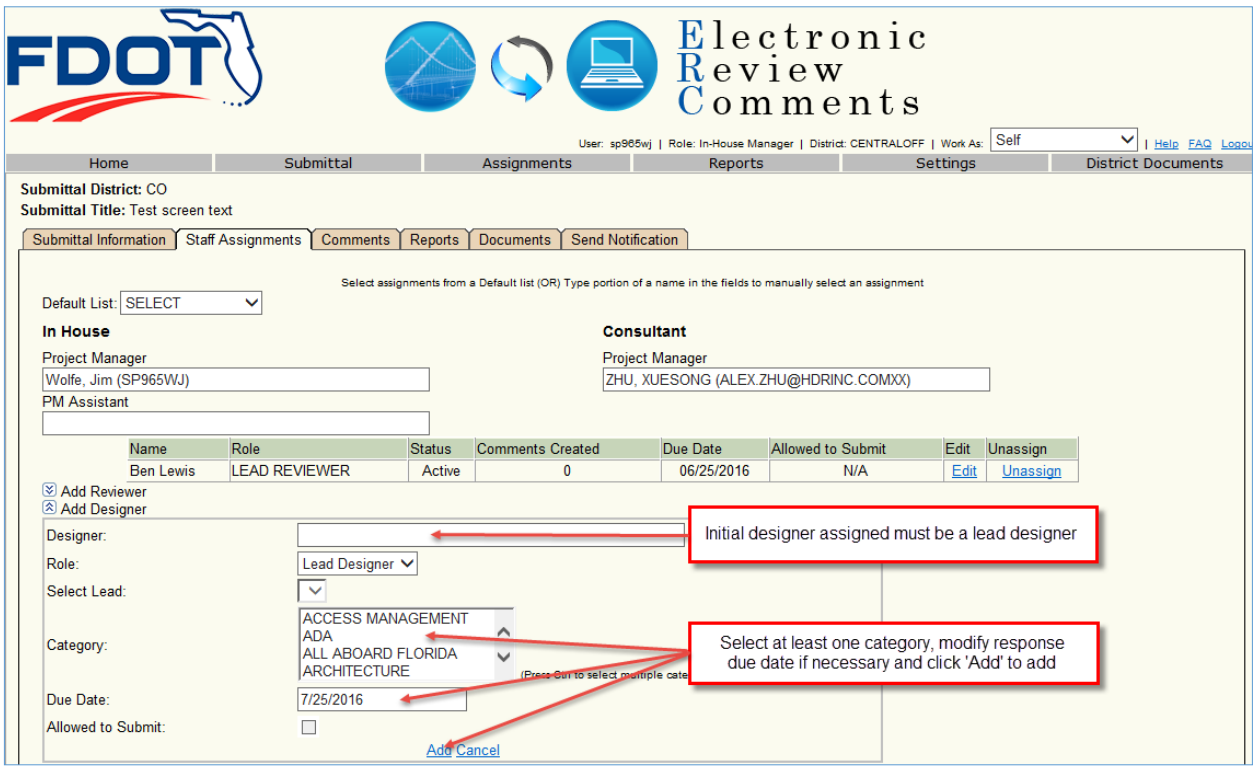
The designers are added by using the same procedure used to add reviewers. Expand the designer section by clicking on the arrows next to **'Add Designer'**. Place the cursor in the **'Designer'** text box and begin typing the name. A list of names will be returned, select the desired name.



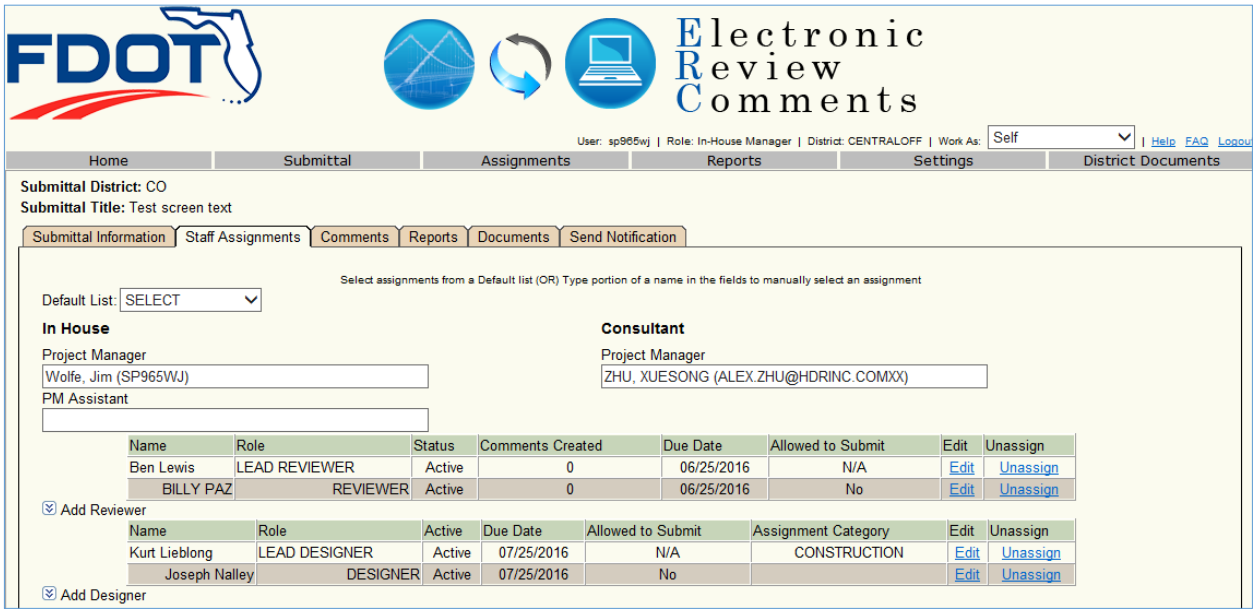


The initial designer assigned must be a Lead Designer. Select at least one category; modify the response due date if necessary, and select the **'Add'** hyperlink to add the Lead Designer. At least one category must be selected for each Lead Designer or Designer, but multiple categories can be selected by pressing the control key. Comments are routed to Lead Designers and Designers based on the categories assigned. If two or more designers have the same category then the Consultant PM, or the In-House PM (for in-house projects) will have to individually assign the comments back to the appropriate Lead Design or Designer.

Designers can be assigned to each Lead Designer. Select at least one category, select the lead designer and select whether the designer is '**Allowed to Submit**'. The '**Allowed to Submit'** checkbox allows the designer to submit their responses without having to be reviewed and submitted by their Lead Designer. Lead Designers are always allowed to submit their own responses.



The District Administrator or the Submittal Creator may not know who the designers are on the project, so these can also be added by either the In-House PM or the Consultant PM. A Lead Designer cannot add another Lead Designer. A Lead Designer can assign Designers under themselves on or before the global submittal due date. Only a District Administrator, In-House PM or Consultant PM can remove a Lead Designer from a submittal.

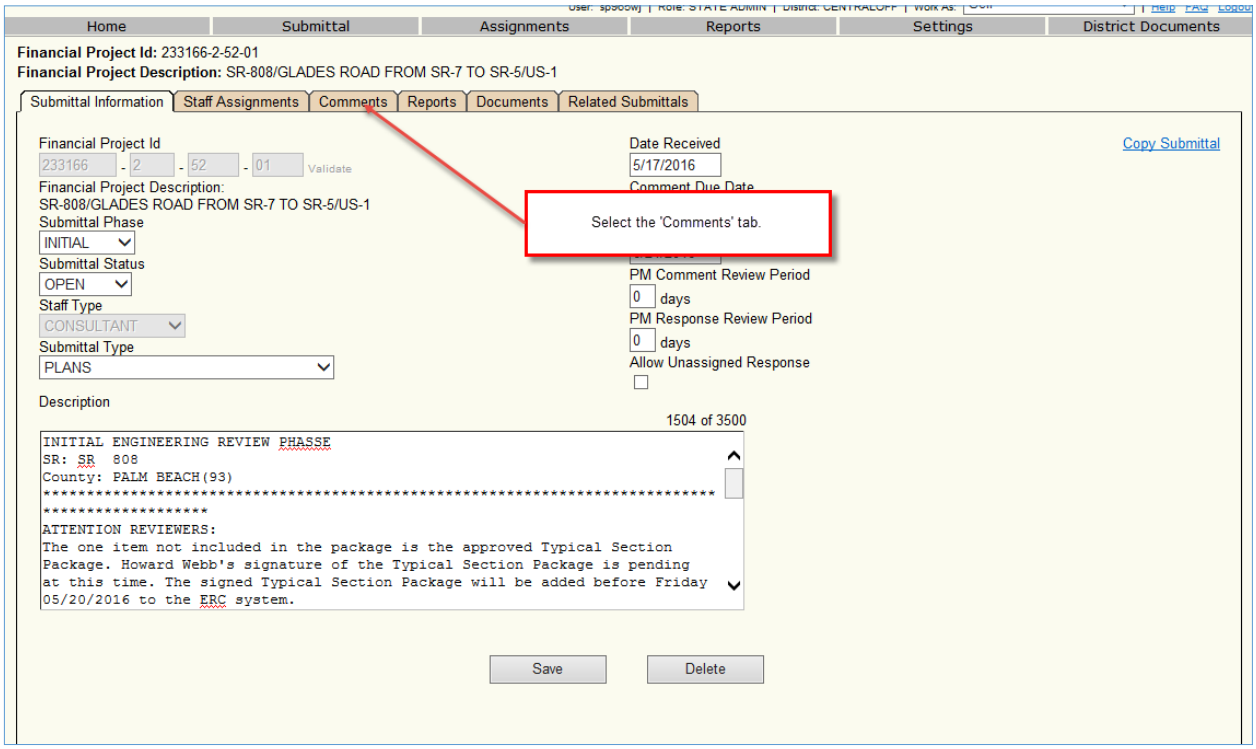


ENTERING COMMENTS

To begin the comment lifecycle each comment is entered by the reviewer on an assigned Submittal. Then the comment follows a lifecycle until the comment has been appropriately responded to by the design team. Comment can go through the lifecycle as many times as needed until a resolution is found, allowing for a dialogue between the reviewers and the designers.

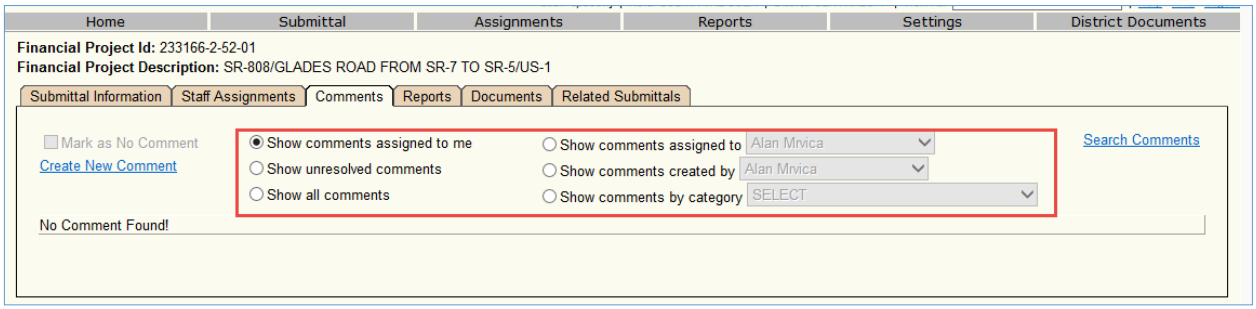
To enter comments on an assigned submittal, select the submittal from the assigned submittal section.

The Submittal Information page will be displayed. Select the '**Comments**' tab to open the Comments page.



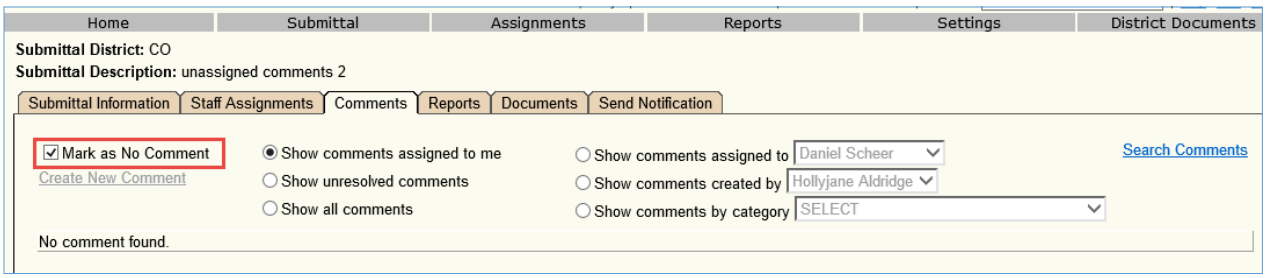
The following options are available for viewing submitted comments:

- **Show comments assigned to me** – Only the comments assigned to the user will display on the screen.
- **Show unresolved comments** – Only the comments on the submittal that are submitted, but not resolved will display on the screen. Does not matter who comments are assigned to.
- **Show all comments** – All submitted comments on the submittal will display on the screen.
- **Show comments assigned to** – Selecting a user assigned to the submittal from the dropdown box will display all the submitted comments currently assigned to that user.
- **Show comments created by** – Selecting a user assigned to the submittal from the dropdown box will display all the submitted comments created by that user.
- **Show comments by category** – Selecting a category from the dropdown box will display all the submitted comments that have that category.

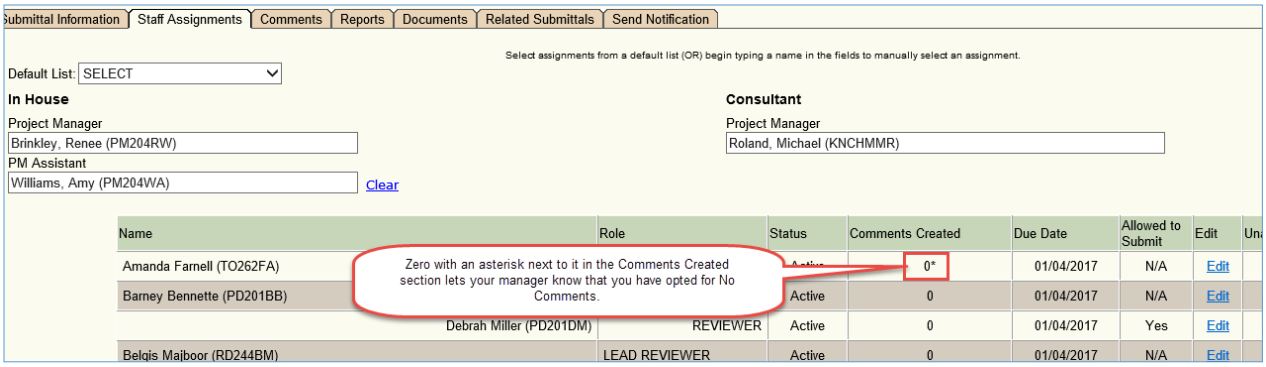


Creating Comments

If your review of the submittal documents resulted with you not having any comments select the '**Mark as No Comment'** check box.



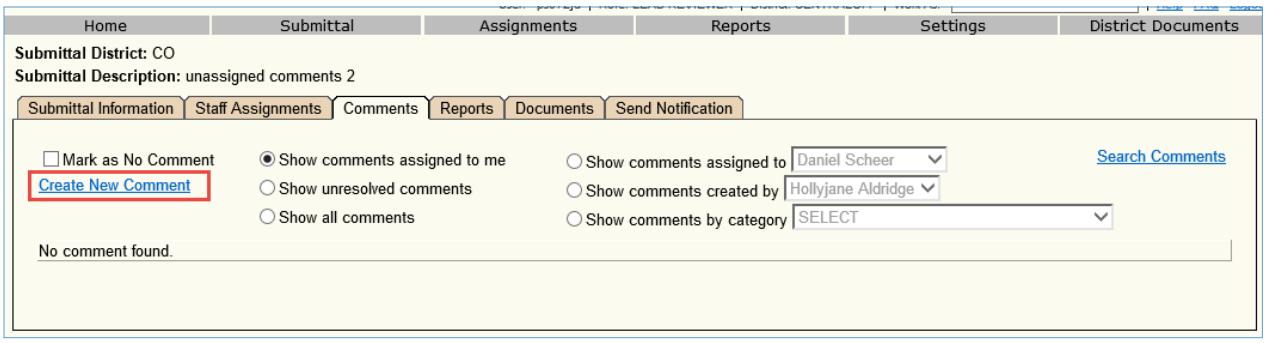
This action will be recorded in the Staff Assignments page in the row where your name is displayed. It will display a zero with an asterisk next to it under the Comments Created section and your manager will know that you have opted for No Comments.



ERC will not let you 'Mark as No Comment' if you have already created a comment. If at a later date you decide to make a comment you can un-select the '**Mark as No Comment'** check box to create a comment.

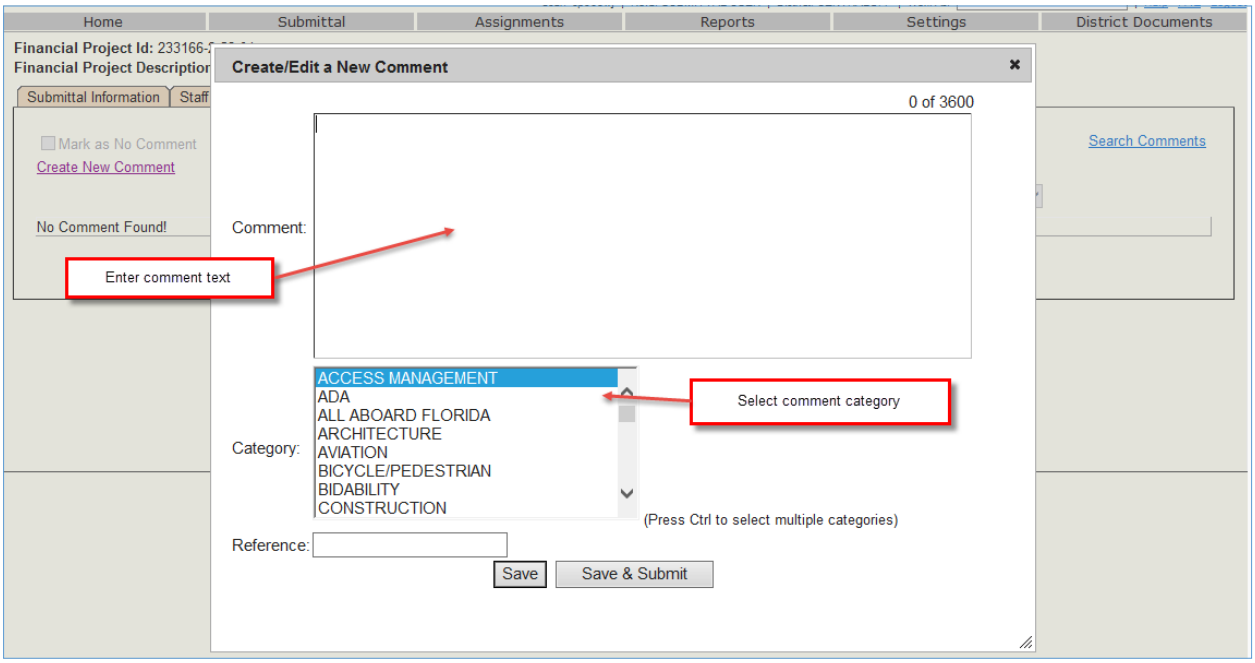
Do not add a comment that you have no comments. That is what the '**Mark as No Comment**' box is for which will register a 0*. By entering a comment that you have no comment, others will have to respond back to agree with your statement.

To submit comments, select the 'Comments' tab. Select '**Create New Comment'** and the '**Create a New Comment'** box will appear.



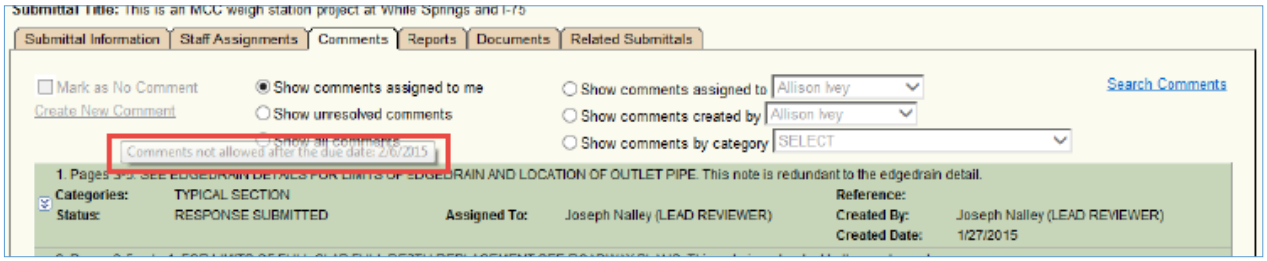
Each individual comment is entered by the Reviewer which then follows a lifecycle until the comment has been appropriately responded to by the design team. Comments can go through the life cycle as many times as needed until a resolution is found, allowing for a dialogue between the Reviewers and the Designers.

Select '**Create New Comment'** and the '**Create a New Comment'** box will appear. Type in your comment, select at least one Category, enter a reference page if applicable and then select '**Save**' to create and save the comment for later updates or '**Save & Submit**' to actually create the comment and submit it to the Lead Reviewer, In-House Project Manager or Consultant Project Manager. Submitting the comment will generate an email notification to the next user in the comment lifecycle.



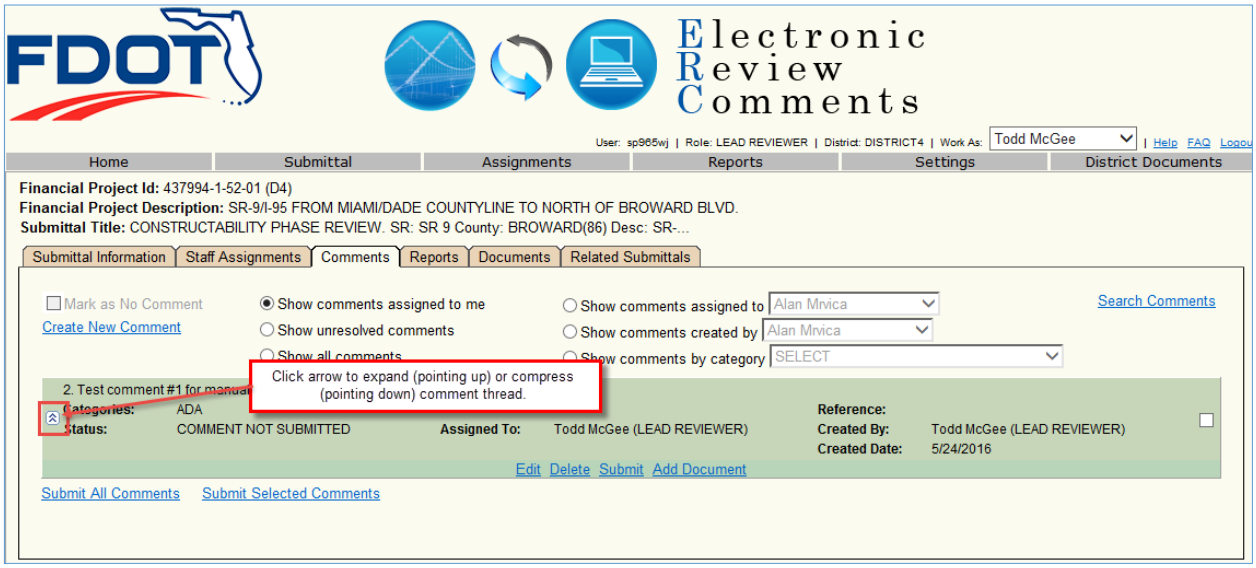
<u>Comments that are only created (saved) must at some point be submitted to move forward in the comment lifecycle</u>.

Once the Comment Due Date has passed within the submittal, under the '**Comments**' tab, the Lead Reviewer / Reviewer will no longer be able to create new comments. The '**Create New Comment'** tab will be grayed out and when the user hovers over the Create New Comment text a pup up box will display saying "Comments not allowed after the due date". If the Lead Reviewer / Reviewer needs to make comments after the Comment Due Date, they will need to contact the In-House PM to extend that date.



Submitting Comments

Once a comment is created (not submitted), the comment screen will look like the screen below:

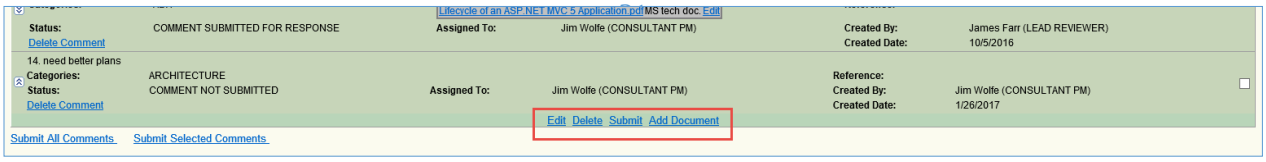


The double arrows pointing up, indicates that the comment thread is expanded. If the arrows are clicked, it will compress the comment. The following information is displayed regarding the comment:

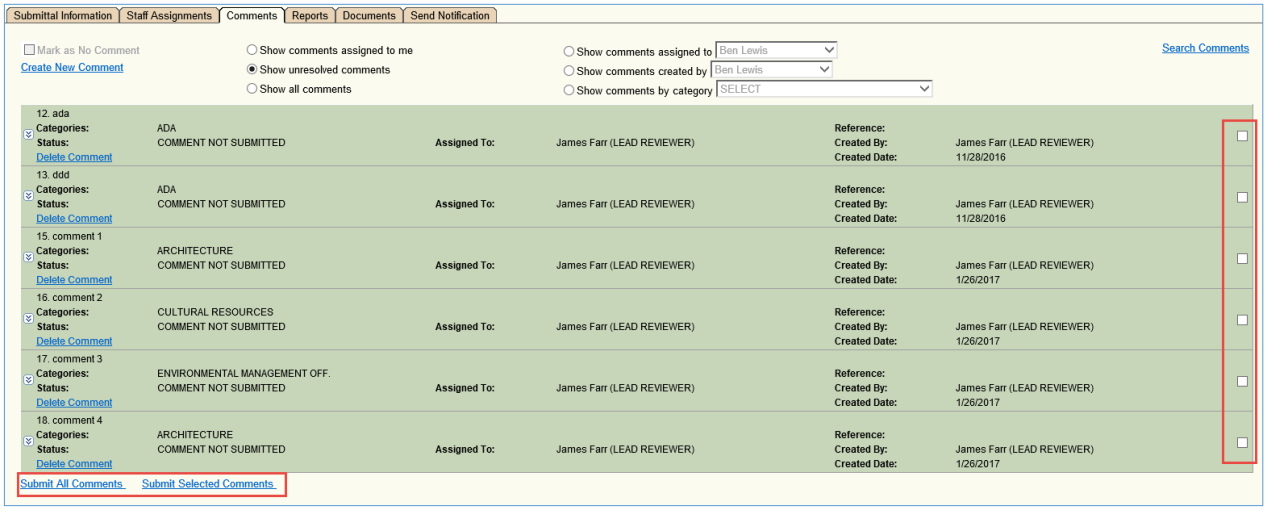
- **Categories** – Indicates the category for the comment
- **Status** – Displays current status of the comment
  - **Comment Not Submitted** – Reviewer has created and saved the comment, but has **not** submitted the comment.
  - **Comment in Review** – Reviewer has created and submitted the comment, but it has not been submitted to the designers for response. Comment is either waiting to be reviewed and submitted by Lead Reviewer or in-house project manager.
  - **Comment Submitted for Response** – Comment has been submitted to the designers for response.
  - **Response in Review** – Response has been created, but has not been submitted to reviewers.
  - **Response Submitted** – Response has been submitted to reviewers.
  - **Response Accepted** – Submitted response was accepted by reviewer.
  - **Comment Resolved** – In-house project manager has the ability to resolve a comment at any point in the review cycle. Should be used only if a resolution through the system does not seem possible.
  - **Comment Agreed With** – Comment submitted by reviewer was agreed to by designer or Consultant PM.
- **Assigned To** – Indicates which user the comment is currently assigned to.
- **Reference** – Indicates a page in the submittal that the comment refers to.
- **Created By** – Indicates which user created the comment.

A comment that has been created (saved) but not submitted, the following options are then available to the user.

- **Edit** – Edit the comment text, category or reference.
- **Delete** – Delete the comment.
- **Submit** – Submit the comment.
- **Add Document** – Add supporting document to the comment.



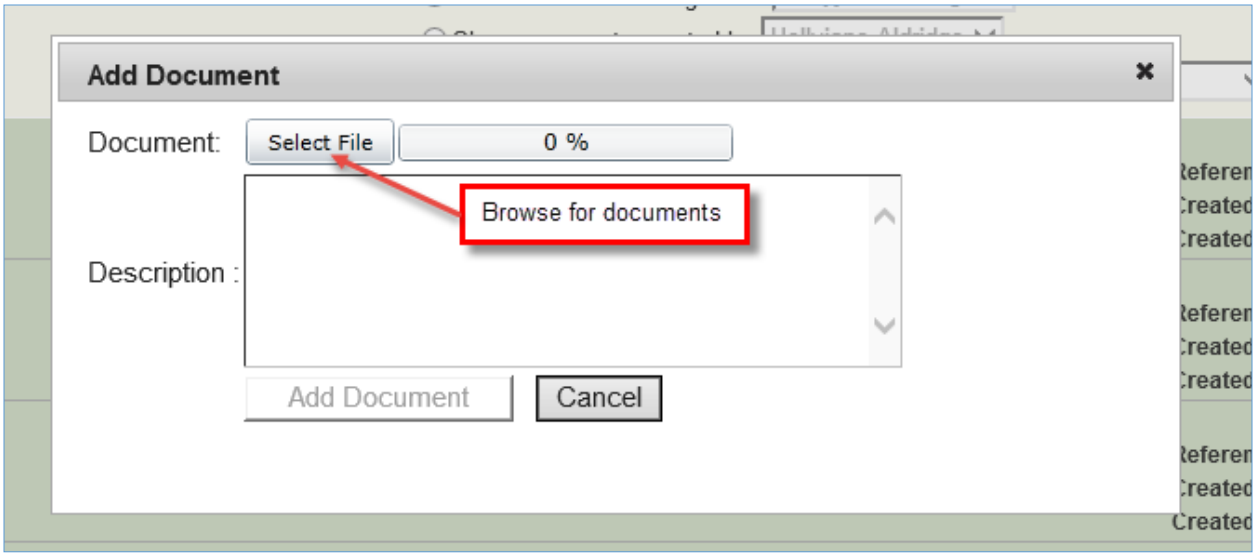
When multiple comments are created they should be submittal all at once. Each time a comment is submitted an email notification is sent to the person who is in the next level of review. If you submit 20 individual comments they will receive 20 emails. If submitted all at once, then only one email will be sent as notification. For comments that have been saved, not submitted, there will be check boxes on the right side. You can select the comments that are ready to submit by checking each box and then select at the bottom left the '**Submit Selected Comments'** tab. Once clicked those comments will be submitted and a single email will alert will be sent to the person for response. If all comments are ready to submit, you do not need to check the boxes, just click on the '**Submit All Comments**' tab. When you click on those tabs an alert will appear asking 'Are you sure you want to submit selected comments'. You can agree by clicking the submit button or choose Cancel to take you back to the comment page.



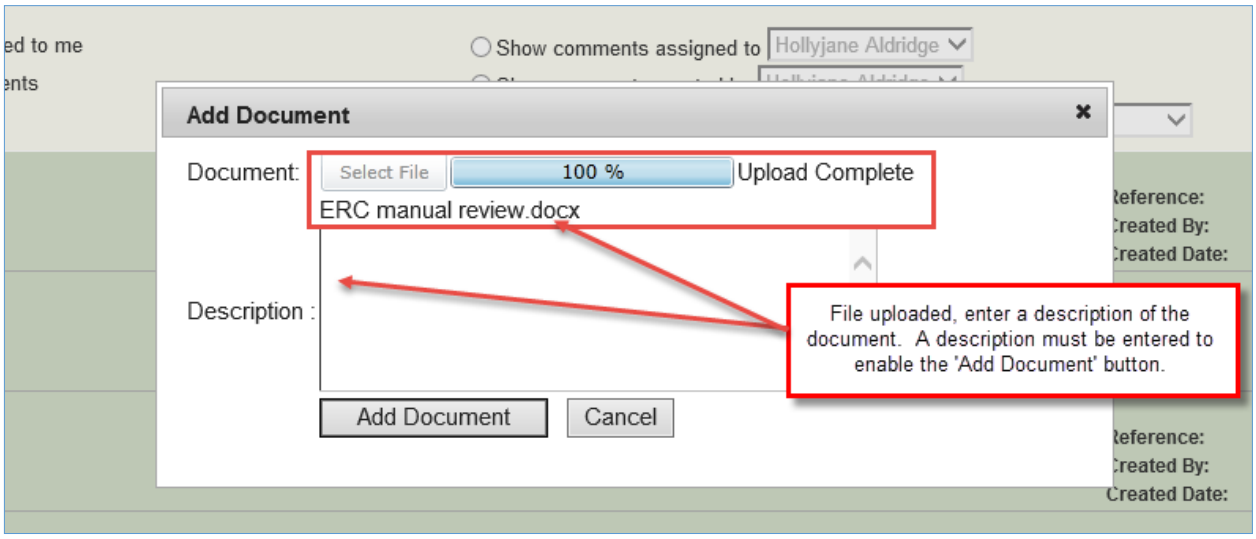
As reviewers submit comments, the comments are no longer assigned to the reviewer and they will drop off the reviewer's action items. They will also not show on the comment page if the '**Show comments assigned to me**' box is checked.

Adding a Document to a Comment

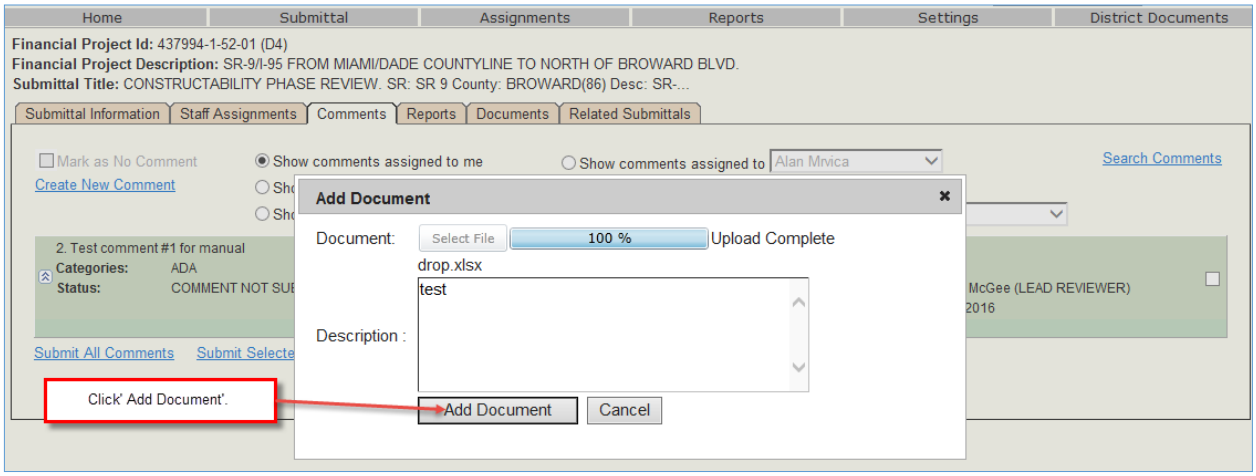
Reviewers can add supporting documentation to the comment by selecting the '**Add Document'** hyperlink below the comment. This must be done prior to submitting the comment. From the 'Add Document' display screen select the Select File Button.



A browser screen will open for you to locate the desired document. Double click on the document file and the file will be uploaded into ERC.



Once the file upload has been completed, add the document description. This will activate the 'Add Document' button. Click the 'Add Document' button and the document will be added to the comment. Comment can now be submitted for a response.



Review Period

Once the comment has been submitted, if a comment review period was set on the Submittal Information Screen then the comment will be assigned to the In-House PM until the review period expires or the In-House PM reviews and takes action on the comment. Once the review period expires, any comments that the In-House PM did not take action on will be automatically transferred to the Consultant PM or Designers.

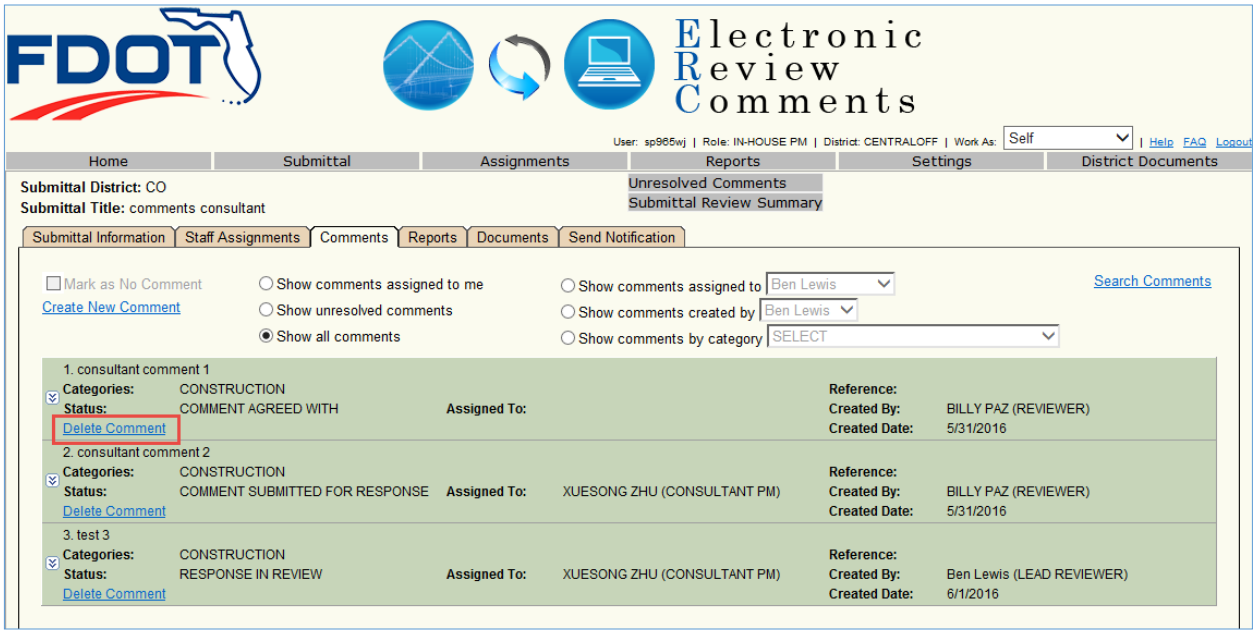
Comment Categories

If designers have been assigned to the submittal with comment categories, then the comments will be automatically assigned to the designers according to the comment categories. If two or more designers have the same comment category, then the comments for that category will be assigned to the In-House PM for Staff Type – In-House Staff and to the Consultant PM for Staff Type – Consultant. If the designers and their respective comment categories have not been assigned when the comments are submitted all the comments will be assigned to the PM.

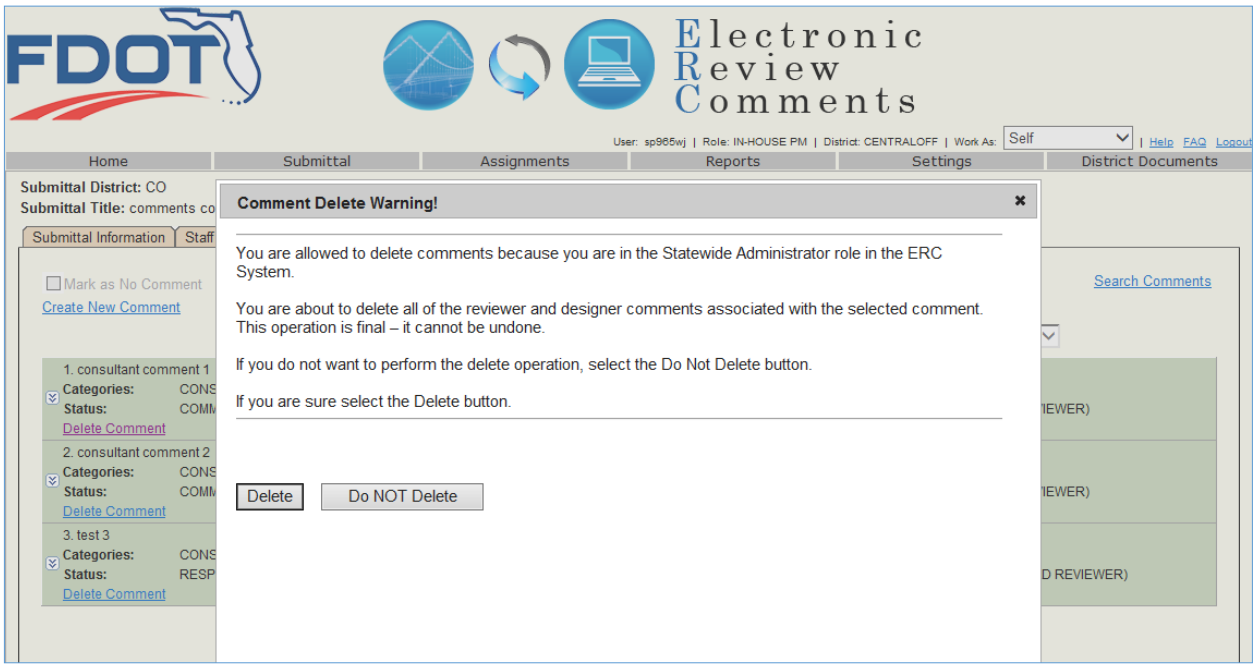
The PM can assign the designers with the appropriate comment categories after the comments have been submitted and the comments will be automatically assigned to the designers according to the comment categories. For more information on assigning staff, see the section on Individual Designer Assignments.

Comment Deletion

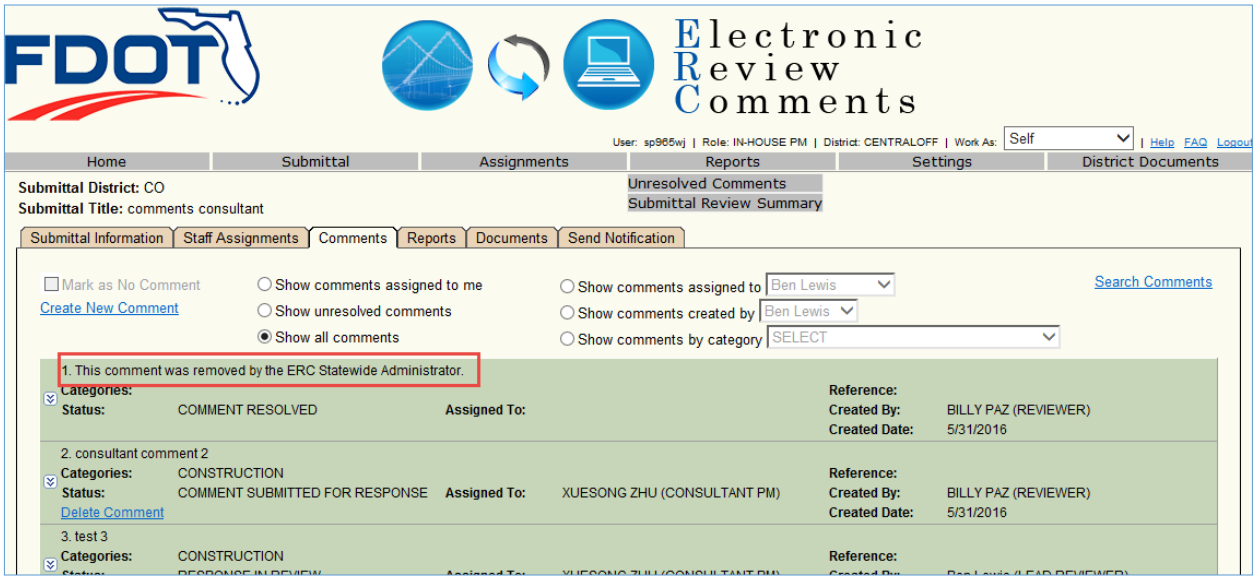
Comments can be deleted from the submittal. For any reason if a comment was made to the wrong submittal or does not apply to the submittal the In-House PM is to contact the Statewide Administrator. The Statewide Administrator's ERC access Comments window shows a 'Delete Comment' link, where non State Administrator's screen view does not show it.



When the Statewide Administrator clicks on the 'Delete Comment' tab the following screen appears.

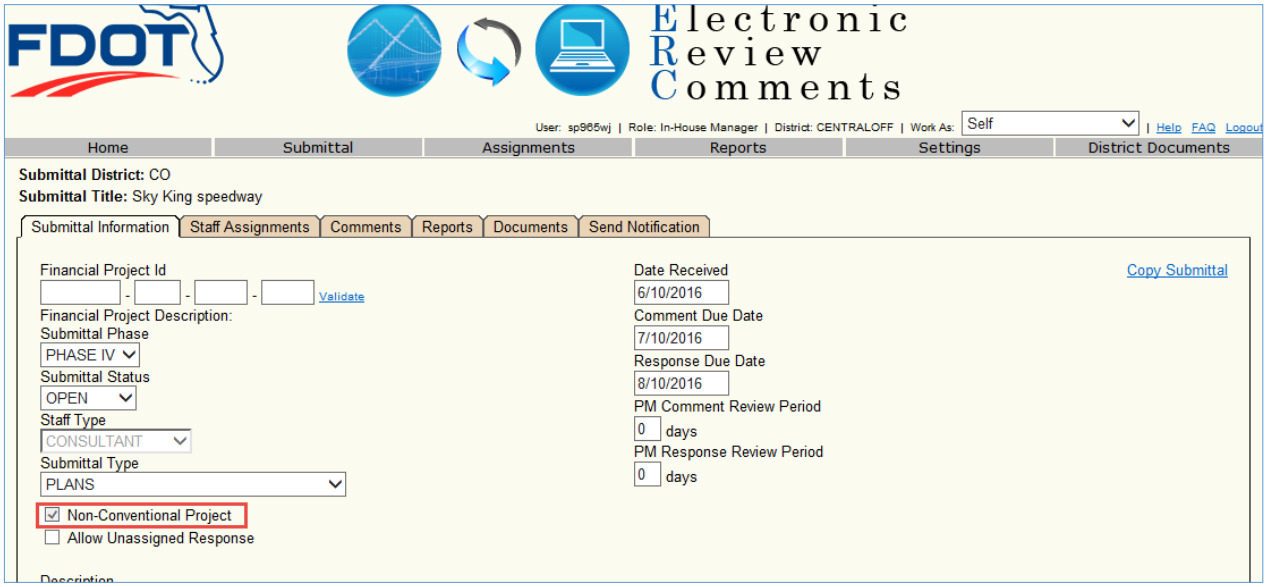


As the warning notes the deletion of the comment is final. The comment's number remains listed and the following statement replaces the comment – "This comment was removed by the ERC Statewide Administrator", as shown below.

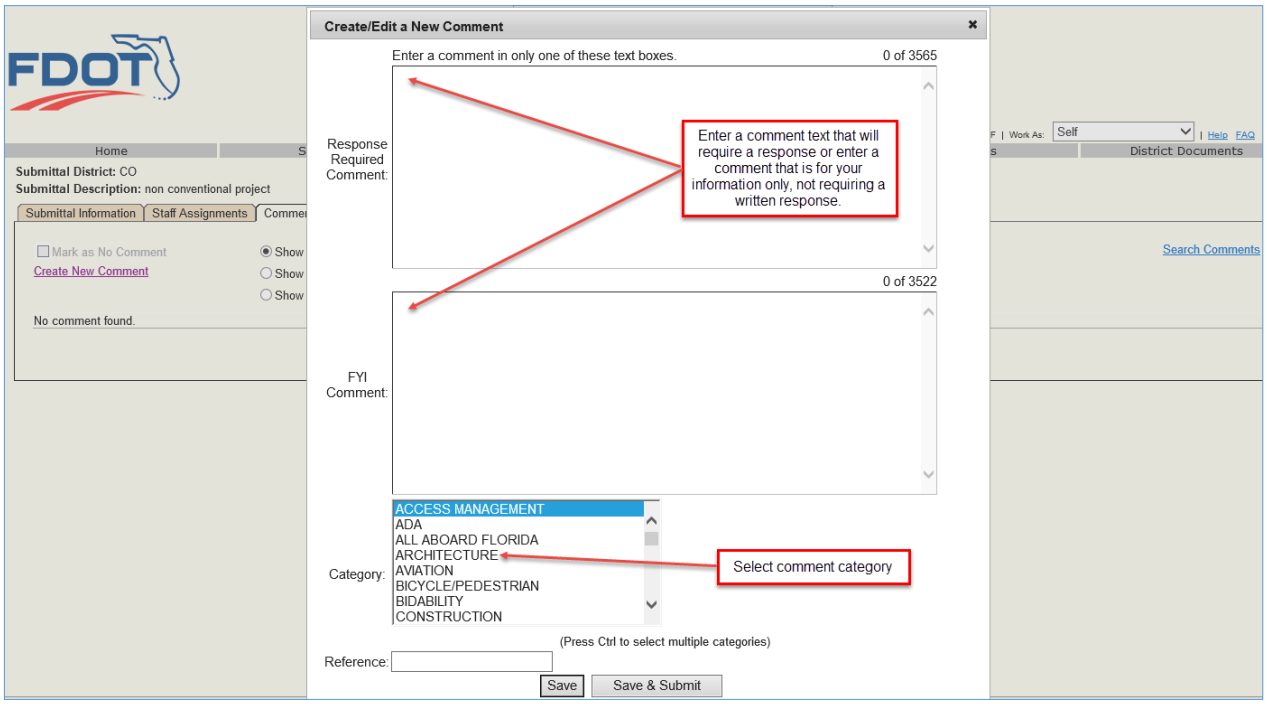


Non-Conventional Project Comments

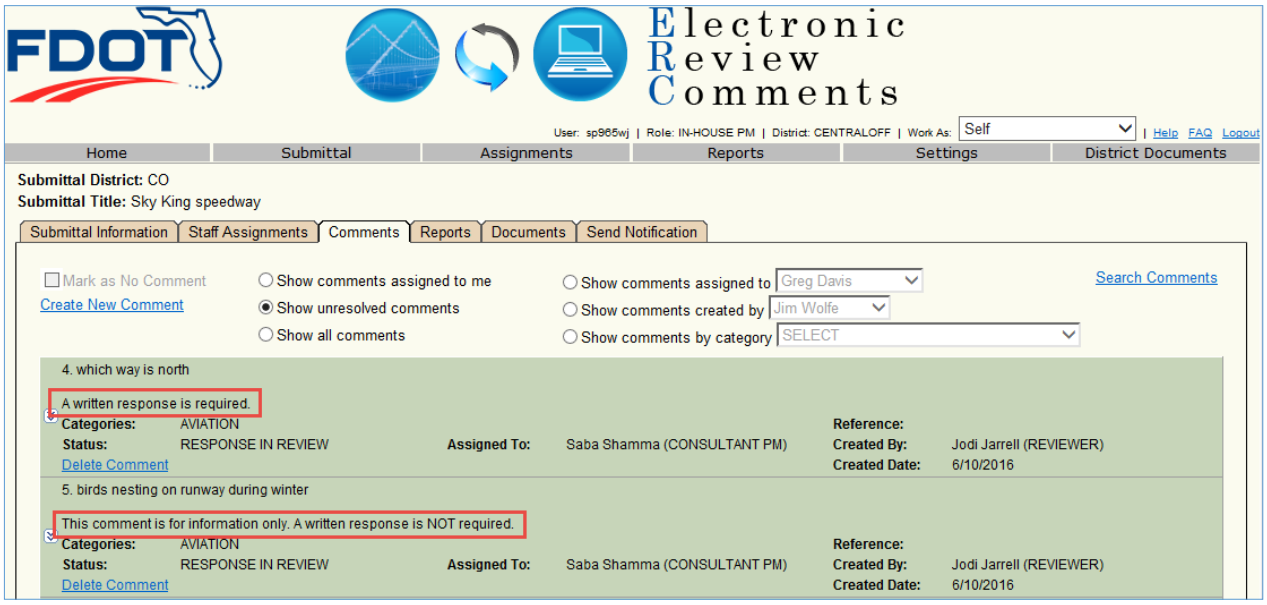
Check box for Non-Conventional Project types, typically design build, will generate a comment entry where either a response is required or the comment is for your information only.



A Non-Conventional Project **p**rovides two text boxes for a comment to be entered – "Response Required Comment" and "FYI Comment." A comment can only be entered into one text box. If a comment is entered into the "Response Required Comment" text box, then the Plans Preparation Manual, Chapter 20, (PPM) required language "A written response is required" will be appended to the end of the user's comment. If a comment is entered into the "FYI Comment" text box, then the PPM required language, "This comment is for information only, A written response is not required" will be appended to the end of the user's comment.



The comments will appear in the following way.



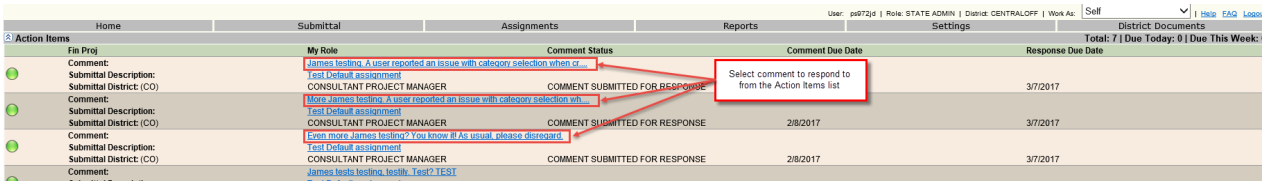
RESPONDING TO COMMENTS

As mentioned earlier there are a number of methods by which an In-House PM can manage a submittal to respond to comments by reviewers.

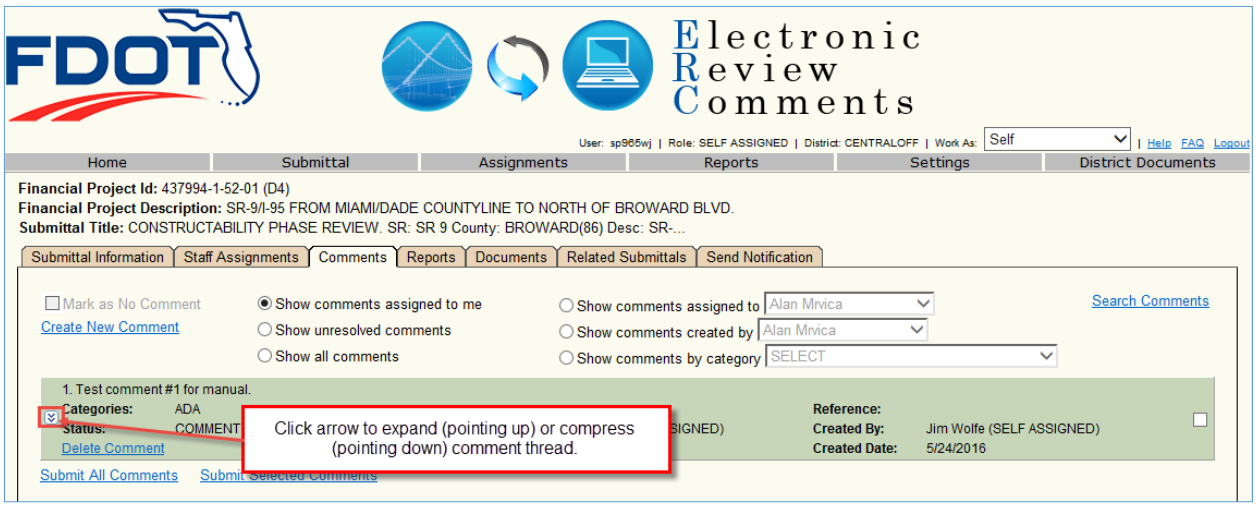
- Staff Type: In-House; In House PM as the lead in responding to comments from reviewers
- Staff Type: In-House; In-House PM with Lead Designers and Designers responding to comments from reviewers
- Staff Type: Consultant; In-House PM with a Consultant PM responding to comments from reviewers
- Staff Type: Consultant; In-House PM / Consultant PM with Lead Designers and Designers responding to comments from reviewers.

When comments have been submitted they will move forward in the comment lifecycle. They will appear as an '**Action Item**' on either the In-House PM, Consultant PM, Lead Designer or Designer Home Page depending upon how the submittal was structured. If you see any items listed under '**Action Items**' in the Home Page, then the comment is waiting for your action. Your Home Page will also provide you with the Total comments, Due Today and Due This Week, which will let you know how many comments are assigned to you, how many are due today and how many are due this week.

Upon submitting the comment an email will be generated to the person that is responsible to respond. They can click on the link in the email notification or they can select the comments from the Action Items list on their Home Page.



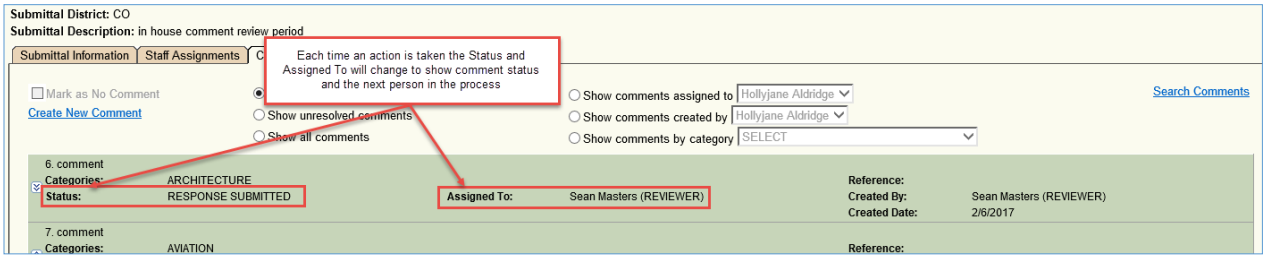
The Comments Page will open with the desired comment thread expanded. Comment threads can be expanded or compressed by clicking on the double arrows next to Categories. Arrows pointing up indicates the comment thread is expanded. Arrows pointing down indicates the comment thread is compressed.



The following information is displayed on the comment page:

- **Categories** – Indicates the category for the comment.
- **Status** – Displays current status of the comment.
    - **Comment Not Submitted** – Reviewer has created and saved the comment, but has **not** submitted the comment.
    - **Comment in Review** – Reviewer has created and submitted the comment, but it has not been submitted to the designers for response. Comment is either waiting to be reviewed and submitted by Lead Reviewer or In-House PM.
    - **Comment Submitted for Response** – Comment has been submitted to the designers, In-House PM or Consultant PM for response.
    - **Response in Review** – Response has been created, but has not been submitted to reviewers.
    - **Response Submitted** – Response has been submitted to reviewers.
    - **Response Accepted** – Submitted response was accepted by reviewer.
    - **Comment Resolved** – In-House PM has the ability to resolve a comment at any point in the review cycle. Should be used only if a resolution through the system does not seem possible.
    - **Comment Agreed With** – Comment submitted by reviewer was agreed to by designer.
- **Assigned To** – Indicates which user the comment or response is currently assigned to.
- **Reference** – Indicates a page in the submittal that the comment refers to.
- **Created By** – Indicates which user created the comment.

Each time an action is taken the **Status** will change to reflect the new comment status and the **Assigned To** will change to identify who is the next person in the comment/response process, until the comment/response is closed.



Staff Type: In-House

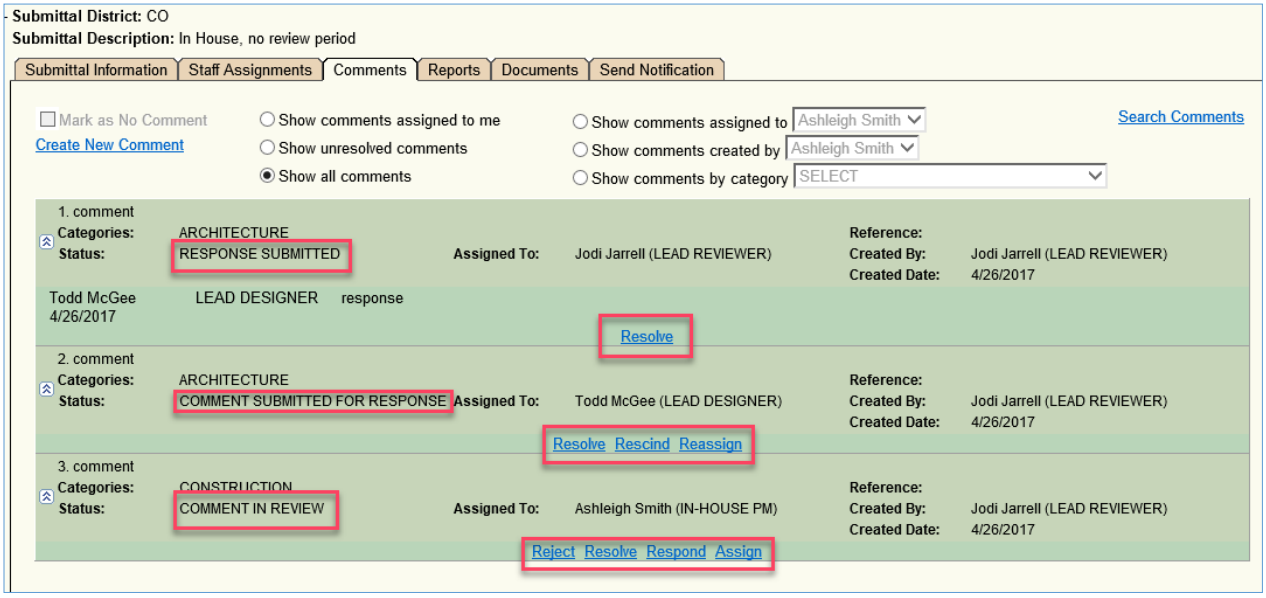
Special note for ERC District Administrators: District Administrators when assigned to a submittal will have an extra option when processing comments that others will not have:

- **Rescind –** select this to return the response to the user that created the comment.

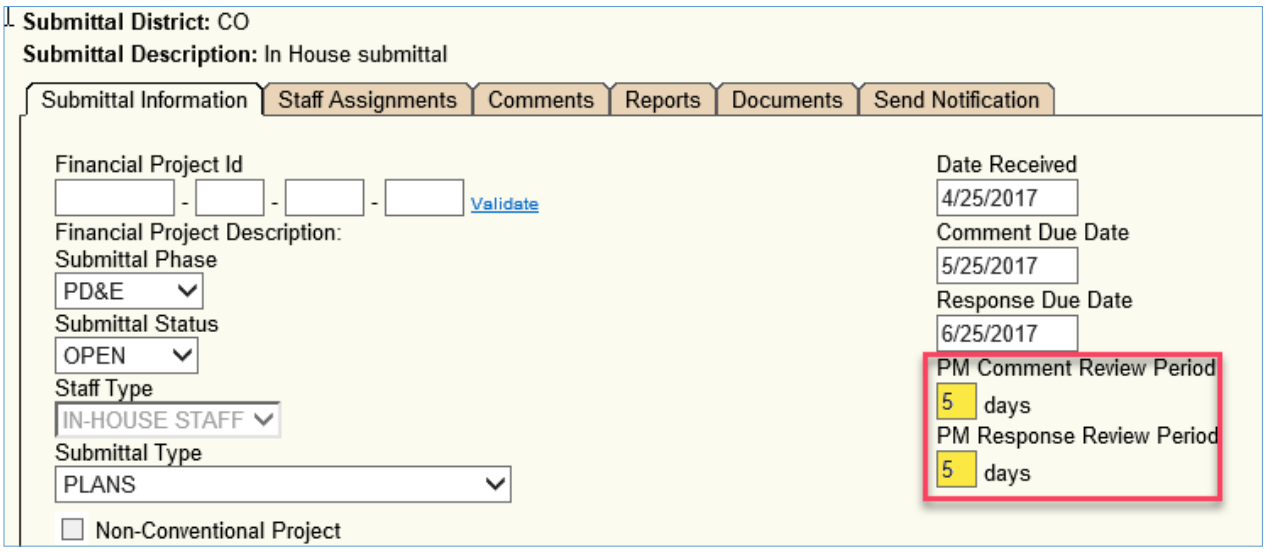
In-House PM Options

The following options are available to the In-House PM when a comment has been submitted, in various comment status:

- **Reject** – Select this to reject the comment back to the Lead Reviewer or Reviewer.
- **Resolve** – In-House PMs have this option to close the comment if an agreeable resolution is not foreseeable.
- **Respond** – Select this to respond to the comment.
- **Assign** - Select this to assign the comment to designers assigned to the submittal.

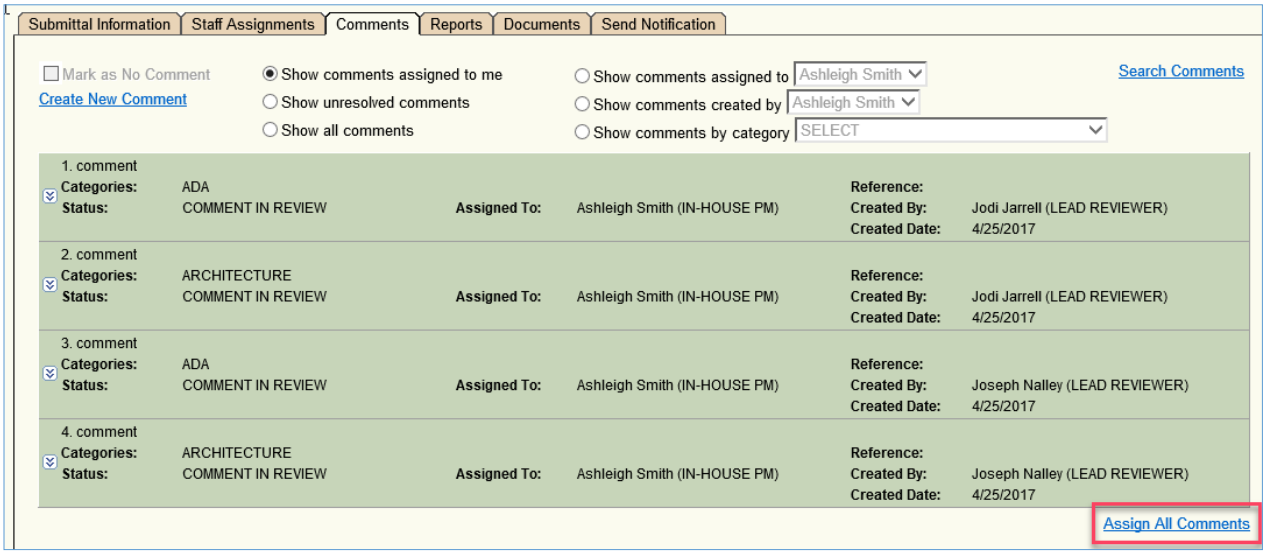


When the submittal is created and utilizes the PM Comment or PM Response Review Periods, all comments or responses will be assign to the PM. .



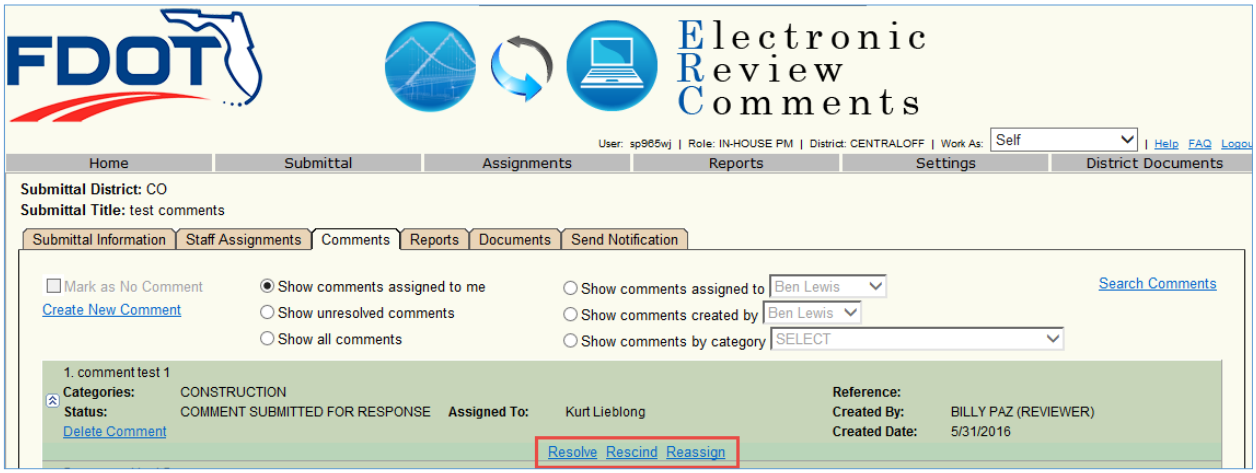
During the review period the following option is available to the PM.

- **Assign All Comments** – This option becomes available when the submittal utilizes the PM Comment Review or the PM Response Review Period on the Submittal Information page. When the Submittal Information page contains a number of days for those items, the In-House or Consultant PM is holding the comments or responses until they have an opportunity to review them prior to the comments moving on to the assigned designer or reviewer, a grace period. Select this option '**Assign All Comments'** to assign all comments to designers that have matching comment categories on the Staff Assignments page. If more than one designer has a comment category the comments with that category will remain assigned to the In-House PM.



Once the In-House PM assigns the comments to a Lead Designer or Designer, the In-House PM will have the following options:

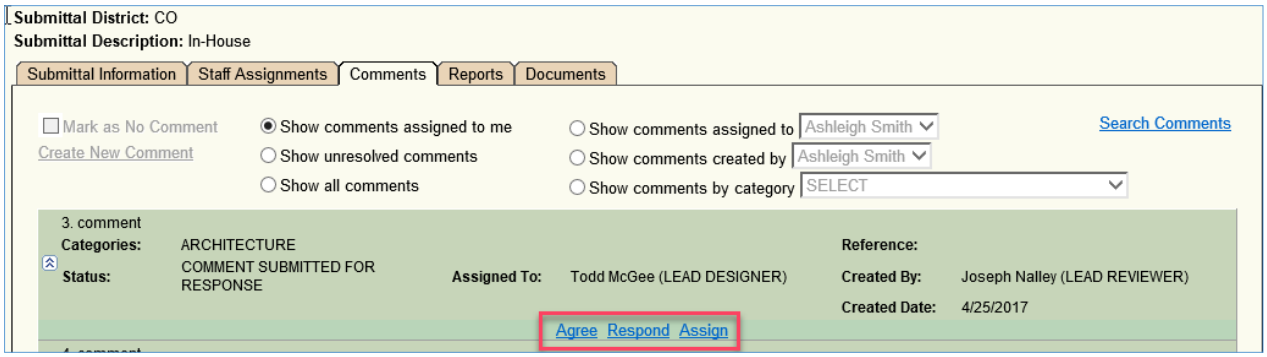
- **Resolve –** In-House PM has this option to close the comment if an agreeable resolution is not foreseeable.
- **Rescind –** Select this option to return the comment to the original comment creator. Essentially starting the comment lifecycle over.
- **Reassign –** Allows the In-House PM to reassign the comments to another designer including themselves.



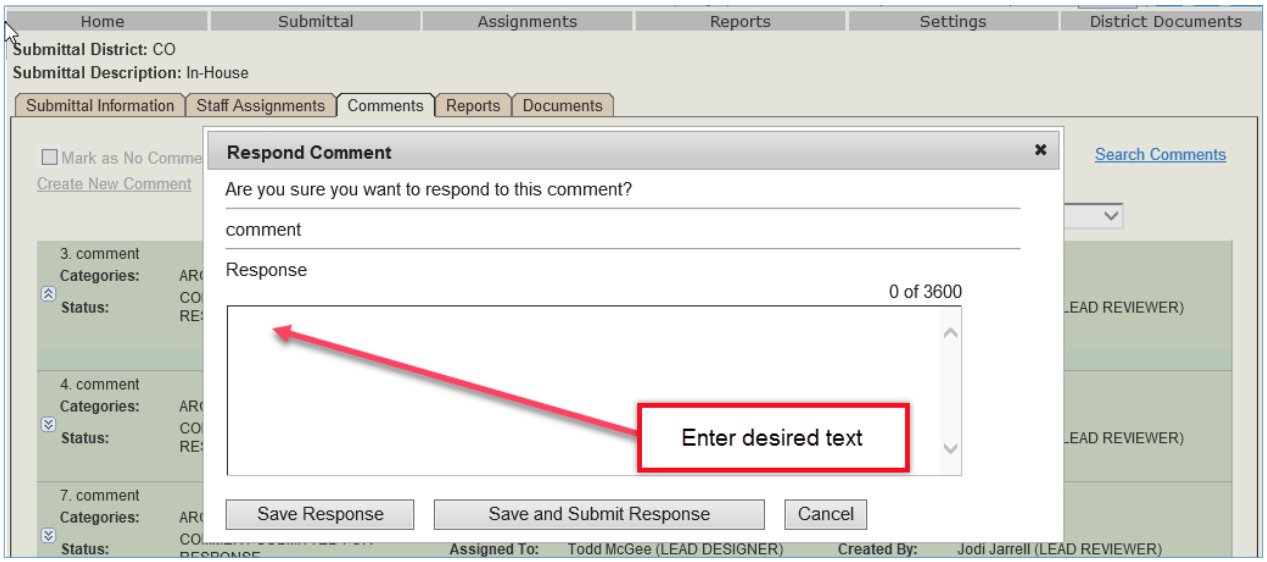
Lead Designer and Designer Options

The following options are available to the Lead Designers and Designers when a comment is submitted for response:

- **Agree** - Select this if you agree with the comment. System gives the option to add text, but not required. Selecting this will also close the comment.
- **Respond** - Select this to enter a response to the comment.
- **Assign** - Select this to assign the comment to another designer. **(Assign options only becomes available to the Lead Designers if they have Designers assigned under them).**

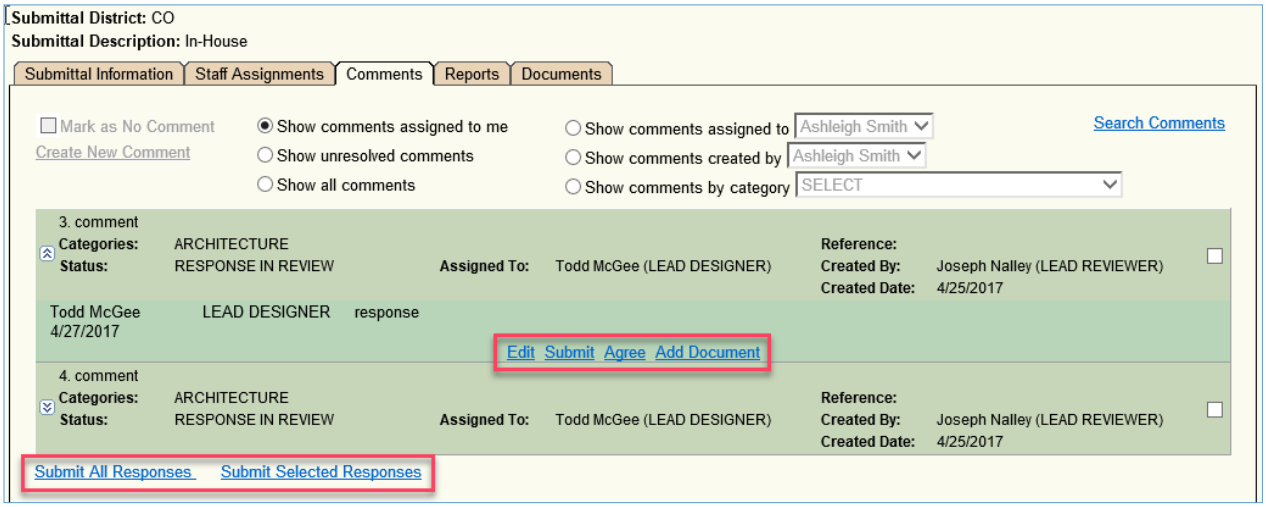


Click the respond hyperlink and the '**Respond Comment'** box will appear. Enter the response and then select '**Save Response'** to save the response or '**Save & Submit Response**' to actually save and submit the response in one step.



The following options are available when responses are saved, but not submitted.

- **Edit** – Edit the response text.
- **Submit** – Submit the response.
- **Agree** - Select this if you agree with the comment. System gives the option to add text, but not required. Do not enter text that is better suited as a response and would require the comment creator to accept. Selecting this will also close the comment.
- **Add Document** – Add supporting document to the response.



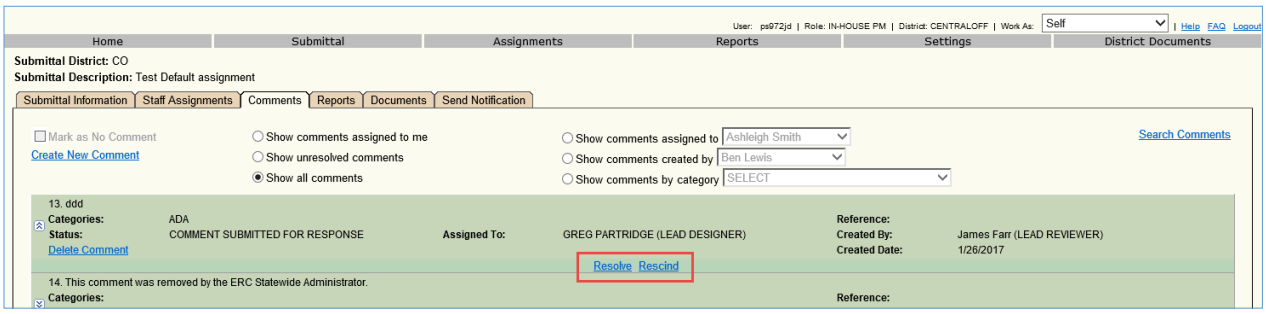
As designers either submit responses or agree to comments, the comments are no longer assigned to the designer and they will drop off the designer's action items. They will also not show on the comment page if the '**Show comments assigned to me**' box is checked.

Staff Type: Consultant

In-House PM Options

The following options are available to the In-House PM when a comment has been submitted to the Consultant PM, Lead Designer or Designer:

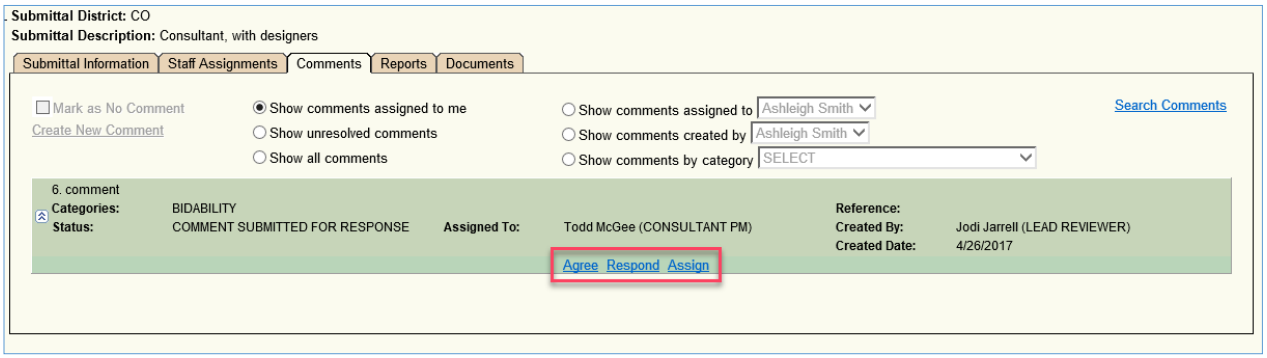
- **Resolve –** In-House PMs have this option to close the comment if an agreeable resolution is not foreseeable.
- **Rescind –** Select this option to return the comment to the original comment creator. Essentially starting the comment lifecycle over.
- **Reopen –** In-House PM can reopen a closed comment if the need arises.



Consultant PM Options

The following options are available to the Consultant PM when a comment is assigned to them for response:

- **Agree** - Select this if you agree with the comment. System gives the option to add text, but not required. Selecting this will also close the comment.
- **Respond** - Select this to enter a response to the comment.
- **Assign** - Select this to assign the comment to another designer. **(Only available to the Consultant PM's and Lead Designers for consultant submittals).**



Once the Consultant PM submits their response or responses by the submittal's Designers they will then have the option:

- **Rescind –** Select this option to return the response back to the person who created the response.

The following options are available to the Consultant PM when a comment is submitted to the Lead Designer or Designer:

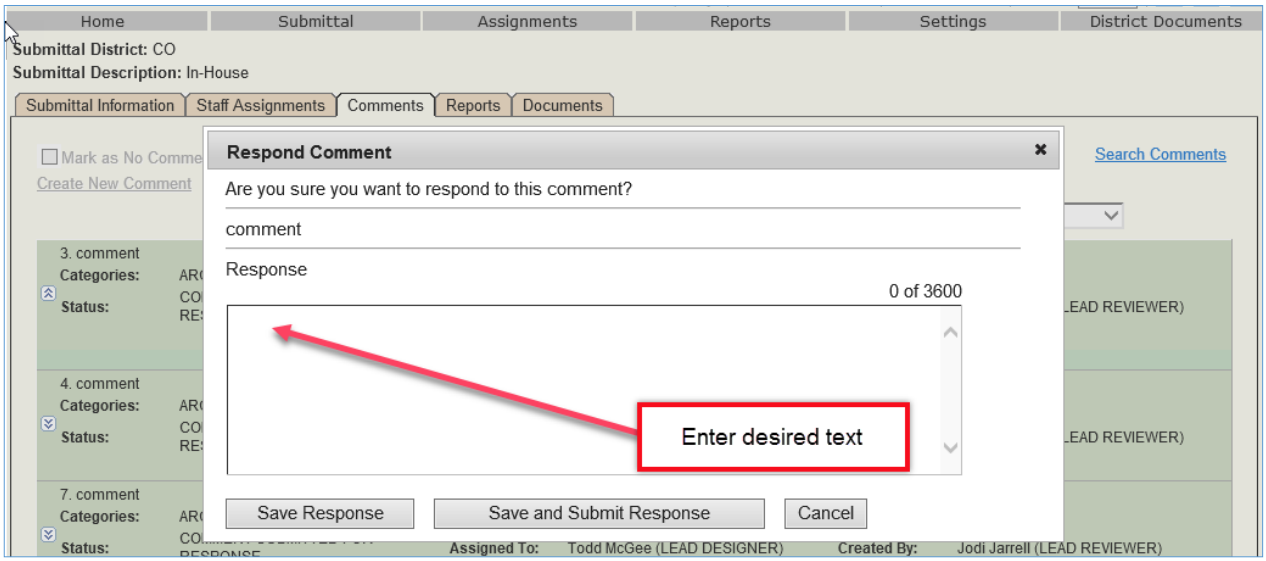
- **Reassign -** allows the Consultant PM to reassign the comment to another designer including themselves.

Lead Designer and Designer Options:

The following options are available to the Lead Designer and Designer when a comment is submitted for response and assigned to them:

- **Agree** – select this if you agree with the comment. System gives the option to add text, but not required. Selecting this will also close the comment.
- **Respond** – select this to enter a response to the comment.
- **Assign** – option for the Lead Designer when they have a Designer under them – select this to assign the comment to another designer.

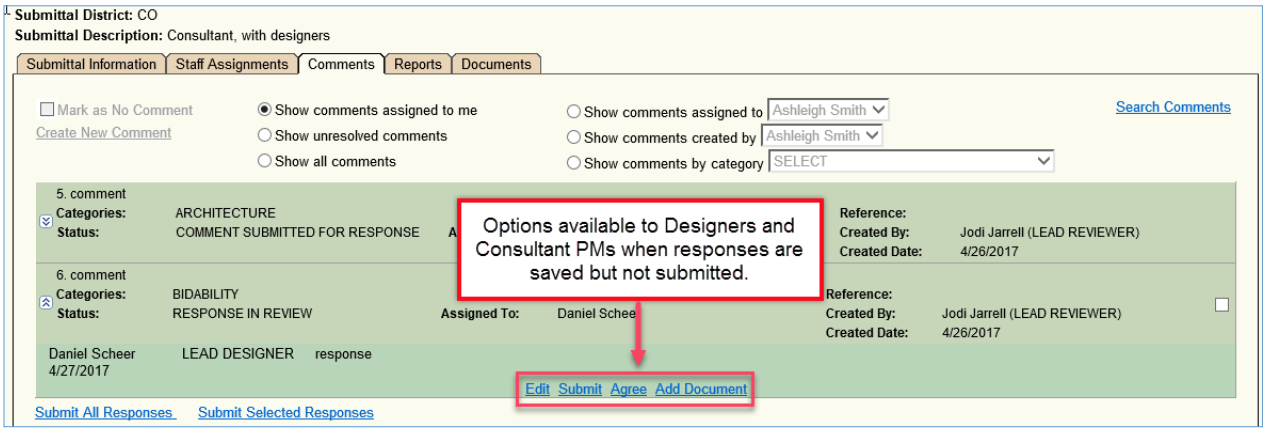
Click the '**Respond**' hyperlink and the '**Respond Comment'** box will appear. Enter the response and then select '**Save Response**' to save the response or '**Save & Submit Response**' to actually save and submit the response in one step.



The following options are available when responses are saved, but not submitted.

- **Edit** – Edit the response text. Lead Designers and Project Managers can edit responses without having to first reject them. The person editing the response will become the owner. **<u>This is for Responses only not Comments.</u>**
- **Submit** – Submit the response.
- **Agree** - Select this if you agree with the comment. System gives the option to add text, but not required. Do not enter text that is better suited as a response and would require the comment creator to accept. Selecting this will also close the comment.

- **Add Document** – Add supporting document to the response.



Once a response is submitted, the Consultant PM will have the option to rescind the response. Selecting '**Rescind**' will return the response to the user that created the response.

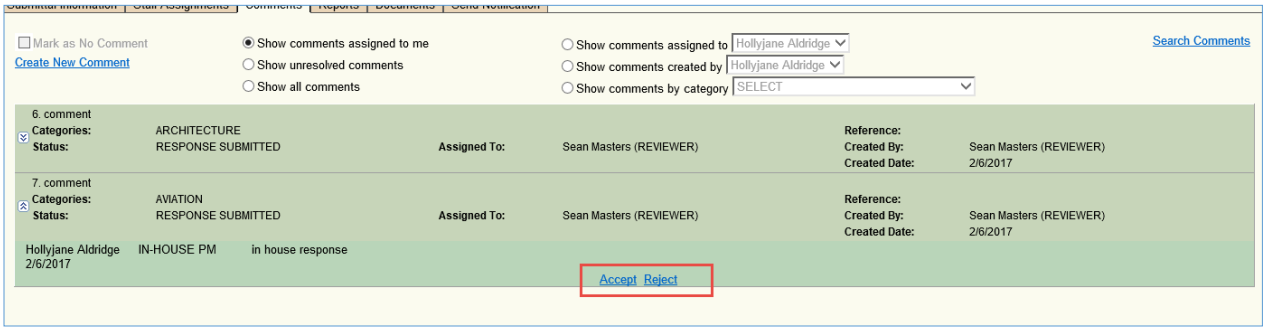
Lead Reviewer and Reviewer Options:

If the comment responses make it back to the Lead Reviewer they will have the following options.

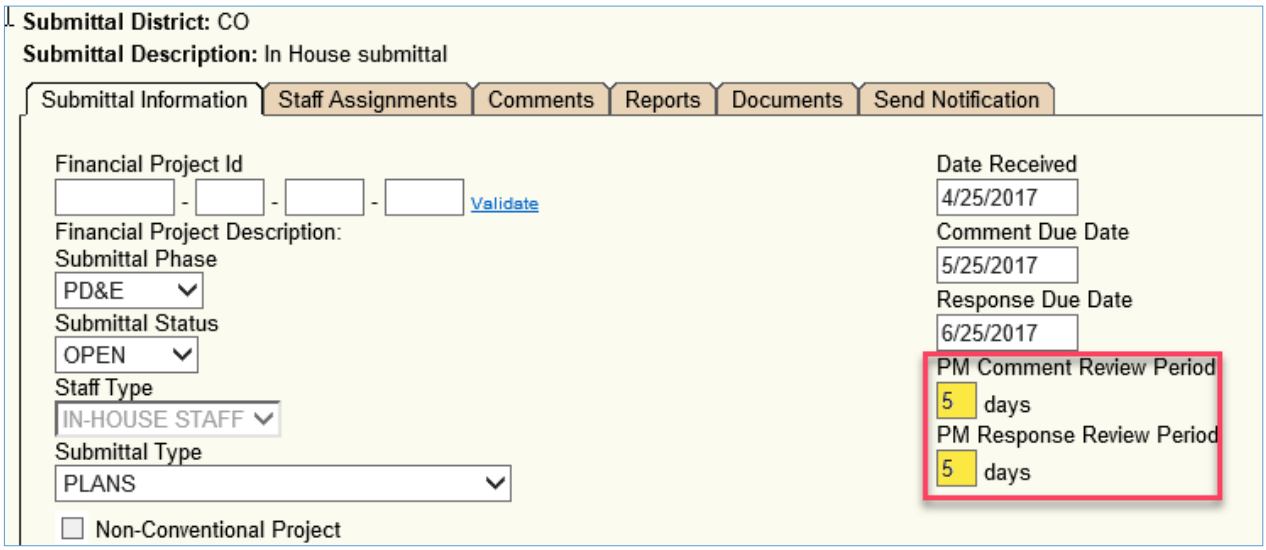
- **Accept** – Select this to accept the response, comment will then close.
- **Reject** – Select this to reject the response. Selecting reject will open a dialogue box for you to type in your rejection comment. Select close and your options will then be Edit, Submit, Assign, Rescind and/or Add Document. Selecting Submit will send the comment back to the person who made the response.
- **Assign -** option for the Lead Reviewer when they have a Reviewer(s) under them – select this to assign the comment to another reviewer.

If the comment responses make it back to the Reviewer they will have the following options.

- **Accept** – Select this to accept the response, comment will then close.
- **Reject** – Select this to reject the response. Selecting reject will open a dialogue box for you to type in your rejection comment. Select close and your options will then be Edit, Submit and/or Add Document. Selecting Submit will send the comment back to the person who made the response.



PM Comment Review / Response Period submittals:



- **PM Comment Review Period –** The review period is used to allow time for the In-House PM to review submitted comments before they are assigned to the designers. After the period has

elapsed, if the PM has not taken action the comments will automatically be assigned to the designers. During the review period the Consultant PM will not be able to see the comments that have not been submitted to the Designers by the In-House PM. They will not show up on submittal reports by the Consultant PM until the expiration of the review period.

- **PM Response Review Period –** This period is used to allow time for the In-house PM to review submitted responses before they are assigned to the reviewers. After the period has elapsed, if the PM has not taken action the responses will automatically be assigned to the reviewers.

Submittals that utilize the option of the PM Comment Review Period will provide the In-House PM with the following options to submitted comments.

- **Submit –** submit moves the comment to the next person to respond.
- **Reject** - Select this to reject the response. Reason for rejection is required. Rejecting a comment will assign the comment thread back to the reviewer.
- **Resolve** – This option to closes the comment. This closes the comment lifecycle.
- **Respond** – responding to the comment sends the response back to the reviewer.

Submittals that utilize the options of the PM Response Review period will have the following options:

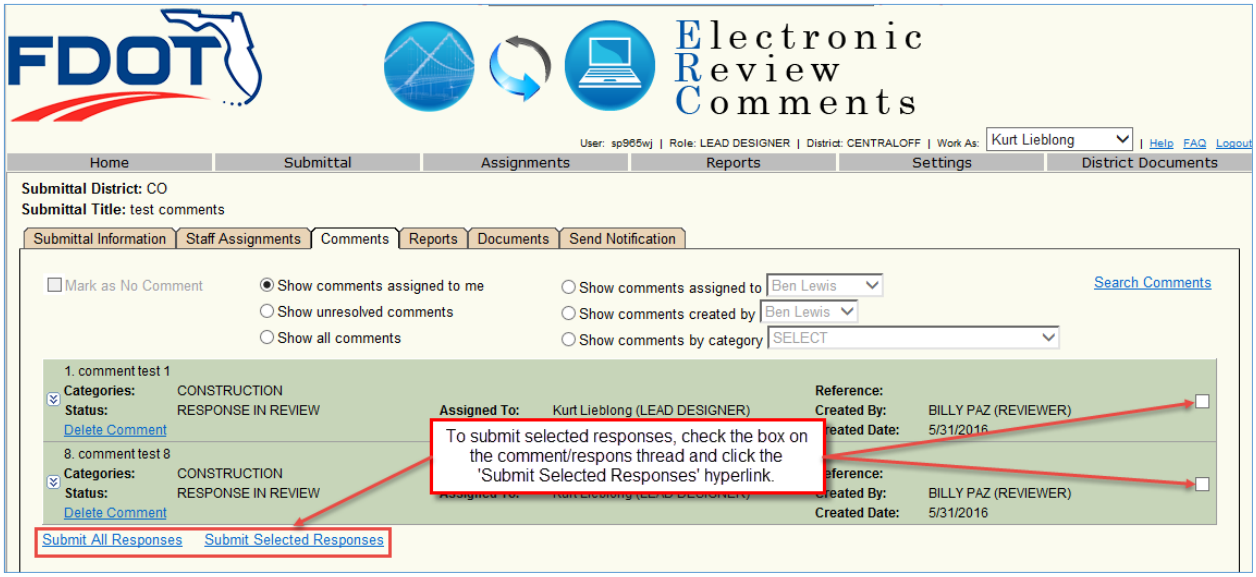
- On Consultant type submittals and responses by the designers will be assigned to the Consultant PM. Submitting and/or Respond to the response will move it to the In-House PM to act on.
- On In-House type submittals any responses by the designers will be assigned to the In-House PM.

The In-House PM will have the following options to Accept, Reject, Resolve, or Assign.

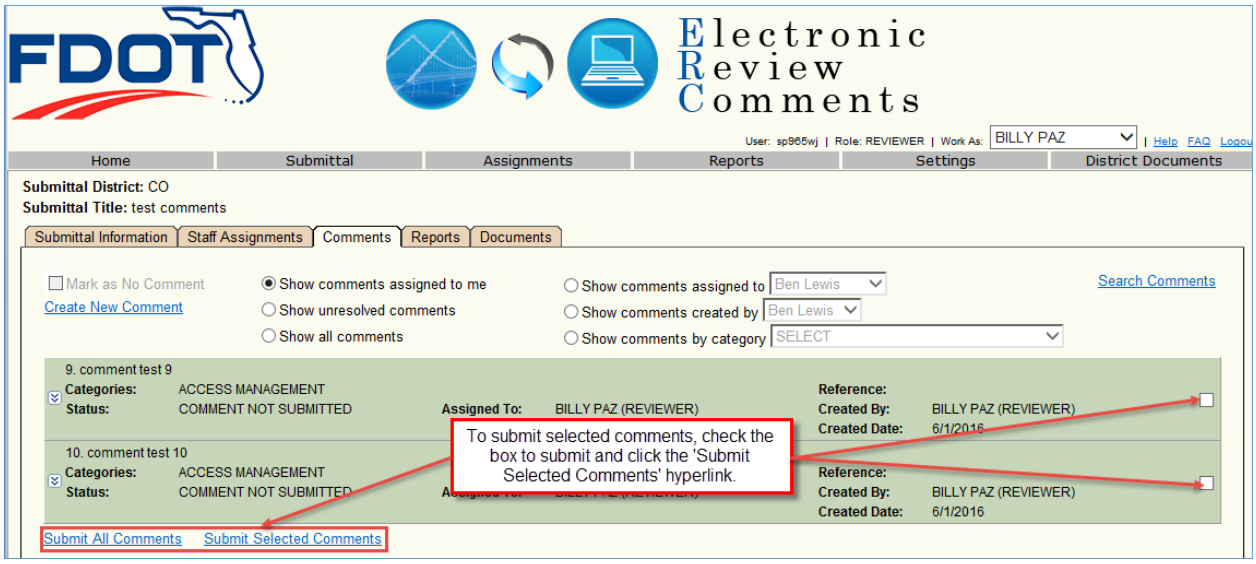
SUBMITTING MULTIPLE RESPONSES/COMMENTS

This gives users the option to submit multiple saved comments or responses on multiple pages via the **'Submit Selected Responses/Comment'** hyperlink. This will submit selected (checkbox) responses/comments and generate only one email (in lieu of the save & submit button for each individual comment/response) and therefore potentially reduce the amount of system generated emails. . To submit all saved responses/comments, click the **'Submit All Response/Comments**' hyperlink.

Submit Selected Reponses/Submit All Responses



Submit Selected Comments/Submit all Comments



RESOLVING RESPONSES

Submittals will remain open until all comments are closed. Once all comments on a submittal are closed and the response due date has passed more than 30 days, the system will automatically close the submittal.

Once responses are submitted by the designers, the comment/response thread will be assigned to either the original comment creator (Reviewer, Lead Reviewer, or In-House PM) or to the In-House PM if there is a response review period. To open and resolve the response select the comment to resolve from the action items list on the Home Page.

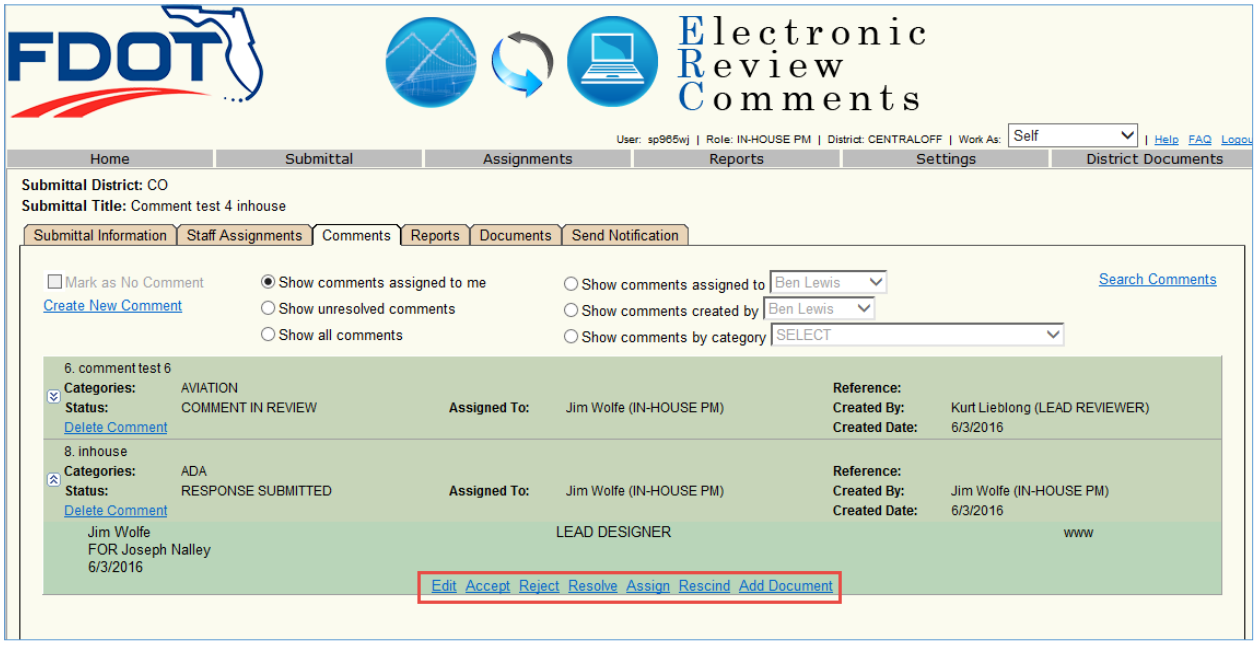
The Comments Page will open with the comment thread expanded.

Staff Type: In-House Staff - In-House PM Options

If a PM Response Review Period (see Submittal Information page) has been set on the submittal then every submitted response will be assigned to the In-House PM until the review period expires for each submitted response or the In-House PM manually assigns it to a reviewer. In other words if the response review is 5 days, the comment/response thread will be assigned to the In-House PM for 5 days from the time the response was submitted. During this review period the In-House PM will have the following options:

- **Edit** – Select to edit the response text.
- **Accept** - Select this to accept the response. System gives the option to add text, but not required. Selecting this will also close the comment.
- **Reject** - Select this to reject the response. Reason for rejection is required.
- **Resolve** – In-House PMs have this option to close the comment if an agreeable resolution is not foreseeable. This closes the comment lifecycle.

- **Assign** - Select this to manually assign the response to the reviewer. The PM can wait until the response review period expires and the system will automatically assign the remaining responses to the original reviewer.
- **Rescind** - Select this option to return the comment to the original comment creator. Essentially starting the comment lifecycle over.
- **Add Document** – Add supporting document to the response (**Only available after a response has been saved, but not submitted**).



Staff Type: Consultant - Consultant PM Options

If a PM Response Review Period (see Submittal Information page) has been set on the submittal then every submitted response will be assigned to the Consultant PM until the review period expires for each submitted response or the Consultant PM manually assigns it to a reviewer. In other words if the response review is 5 days, the comment/response thread will be assigned to the In-House PM for 5 days from the time the response was submitted. During this review period the Consultant PM will have the following options:

- **Edit** – Select to edit the response text.
- **Submit –** submit moves the comment to the next person to respond.
- **Agree -** Select this if you agree with the comment. System gives the option to add text, but not required. Selecting this will also close the comment.
- **Reject** - Select this to reject the response. Reason for rejection is required.
- **Add Document** – Add supporting document to the response (**Only available after a response has been saved, but not submitted**).

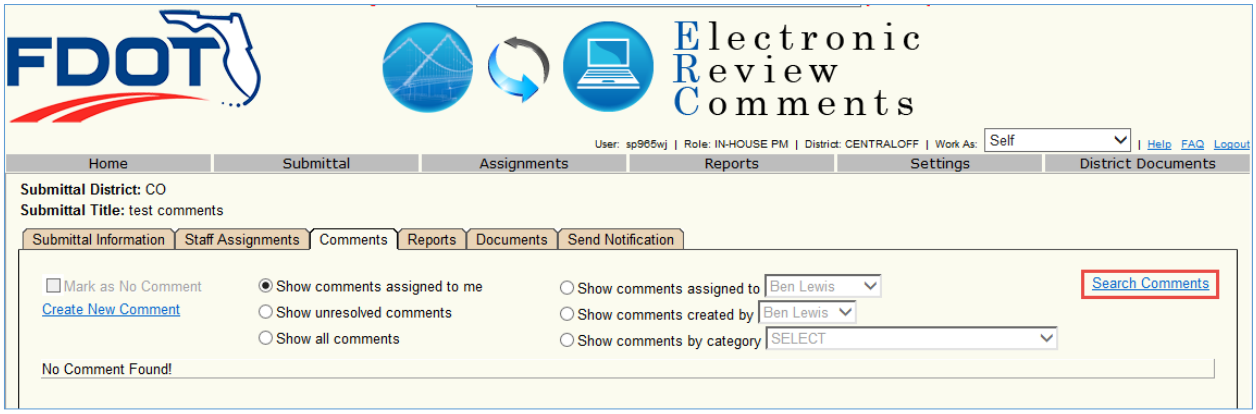
Lead Reviewer and Reviewer Options

Once the responses have been submitted and the comment/response thread is assigned to the Lead Reviewer or Reviewer, they will have the following options:

- **Accept** - Select this to accept the response. System gives the option to add text, but not required. Selecting this will also close the comment and complete the comment lifecycle.
- **Reject** - Select this to reject the response. Reason for rejection is required. Rejecting a response will assign the comment/response thread back to the designers for additional response.
- **Assign** - Select this to assign the comment/response to another reviewer. (Only available to the Lead Reviewer when there are Reviewers assigned under them).

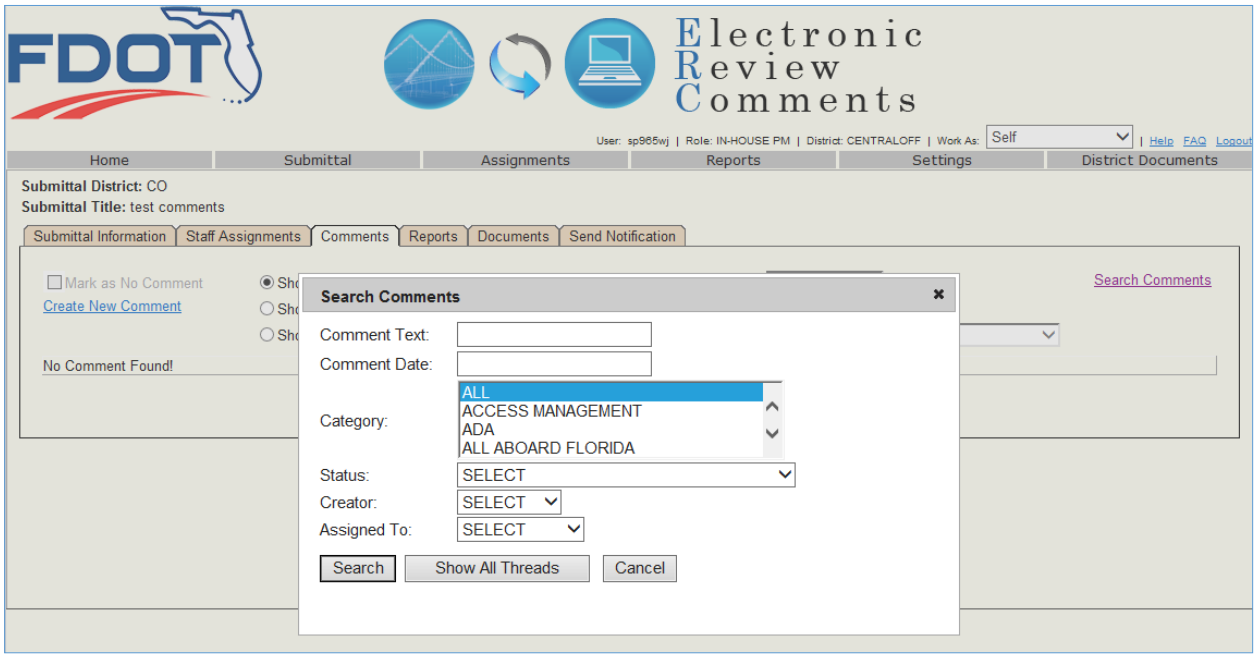
SEARCHING FOR COMMENTS

Users can search for comments on a submittal from the comments page by clicking the **'Search Comments'** hyperlink.



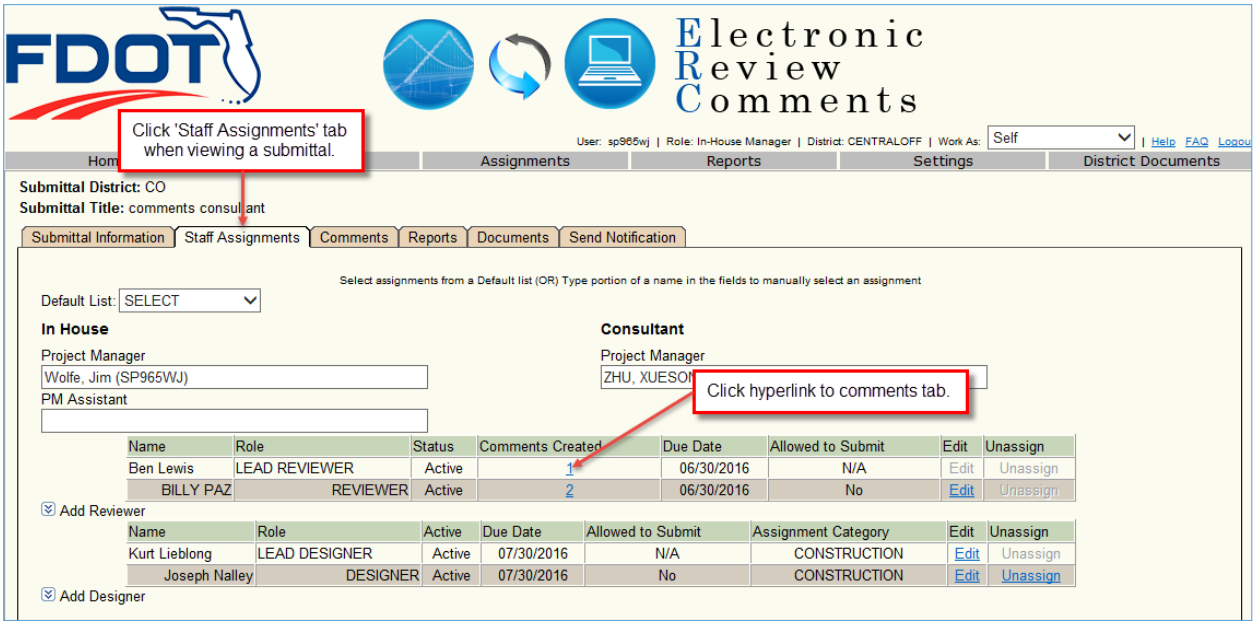
Comments can be search for using the following fields:

- **Comment text** – Enter text to search for.
- **Comment Due Date** – Enter date to search for.
- **Category** – Select comment category to search for.
- **Status** – Search by comment status.
- **Creator** – Select name to search for.
- **Assigned To** – Select name to search for.



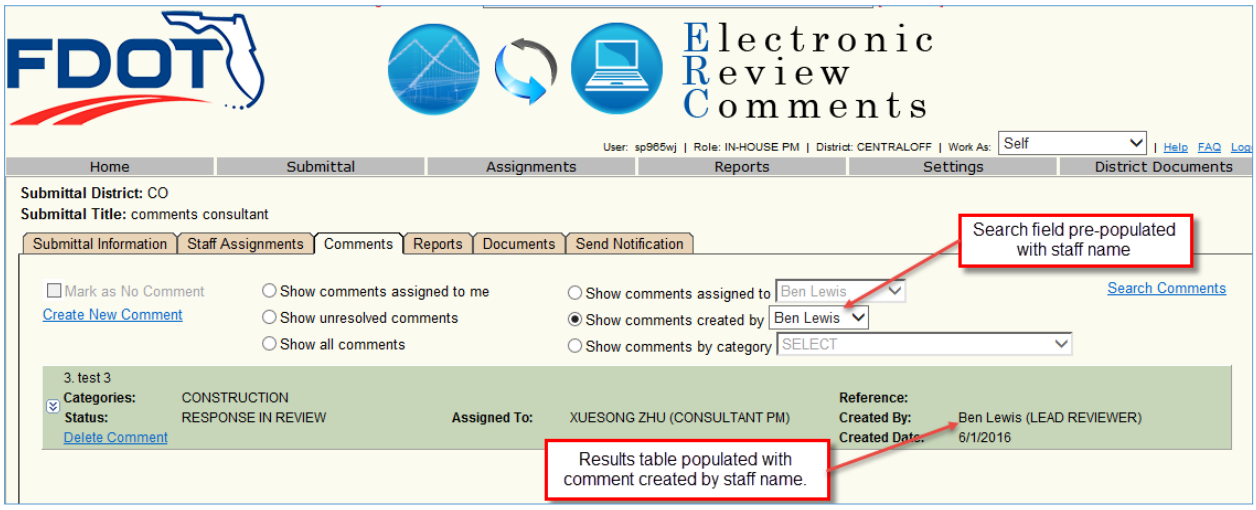
Comment Search Hyperlink

The comment search hyperlink allows users a to search for comments created by an assigned reviewer via the '**Staff Assignments'** tab to view all assigned staff associated with the selected submittal.



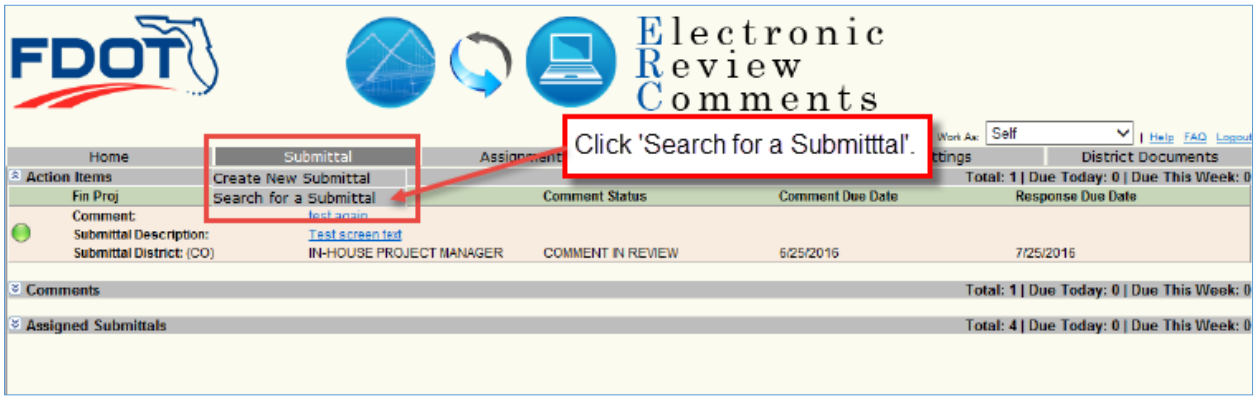
The comments created hyperlink indicates the number of comments created and may not correspond to the number of comments submitted. However, depending on the role of the individual, all created comments may not be displayed. The comment creator will be the only individual who displays the submitted and created comments (saved but not submitted). Other reviewers (not comment creators) will display comments submitted and comments in review. The designer and all others not assigned to the submittal will display submitted comments only.

After selecting the hyperlink, the user is directed to the comments tab with the display of only the comments for that selected assigned staff.



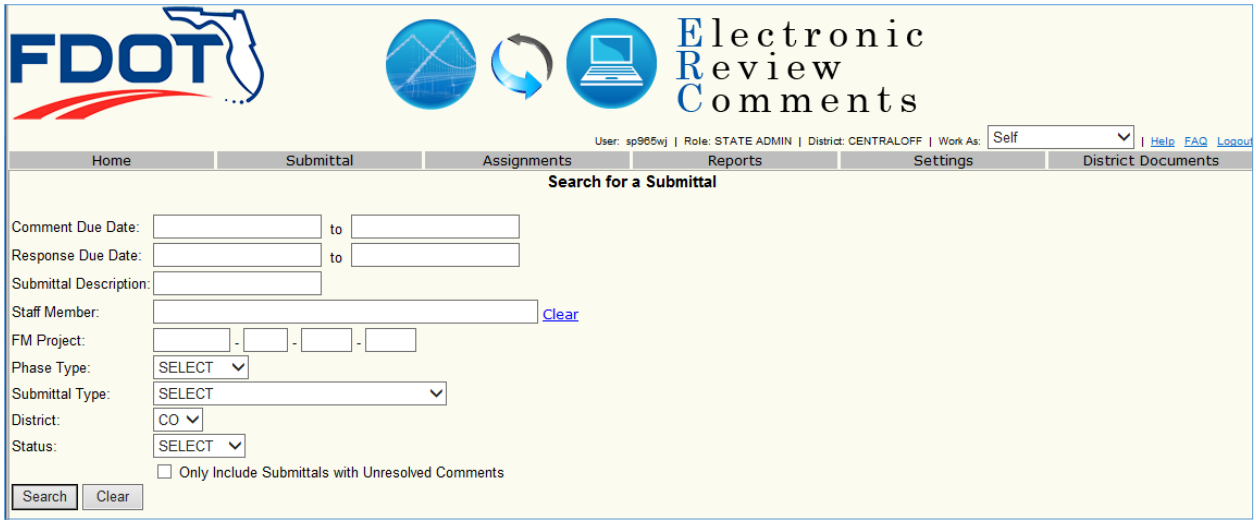
SUBMITTAL SEARCH

Users can search for a submittal by selecting the '**Search for a Submittal**' option under the Submittal menu.



This will open the submittal search page and the following criteria will be available to search by:

- **Comment Due Date** – Enter a range dates to search for the comment due date.
- **Responses Due Date** – Enter a range of dates to search for the response due date.
- **Submittal Description** – Enter text to search for a submittal description.
- **Staff Member** – Begin typing name and then select staff member from returned list.
- **FM Project** – Type in a full or partial FM # (minimum first 6 digits required).
- **Phase Type** – Select from the dropdown.
- **Submittal Type** – Select from the dropdown.
- **District** – Select from dropdown.
- **Status** – Select from dropdown.

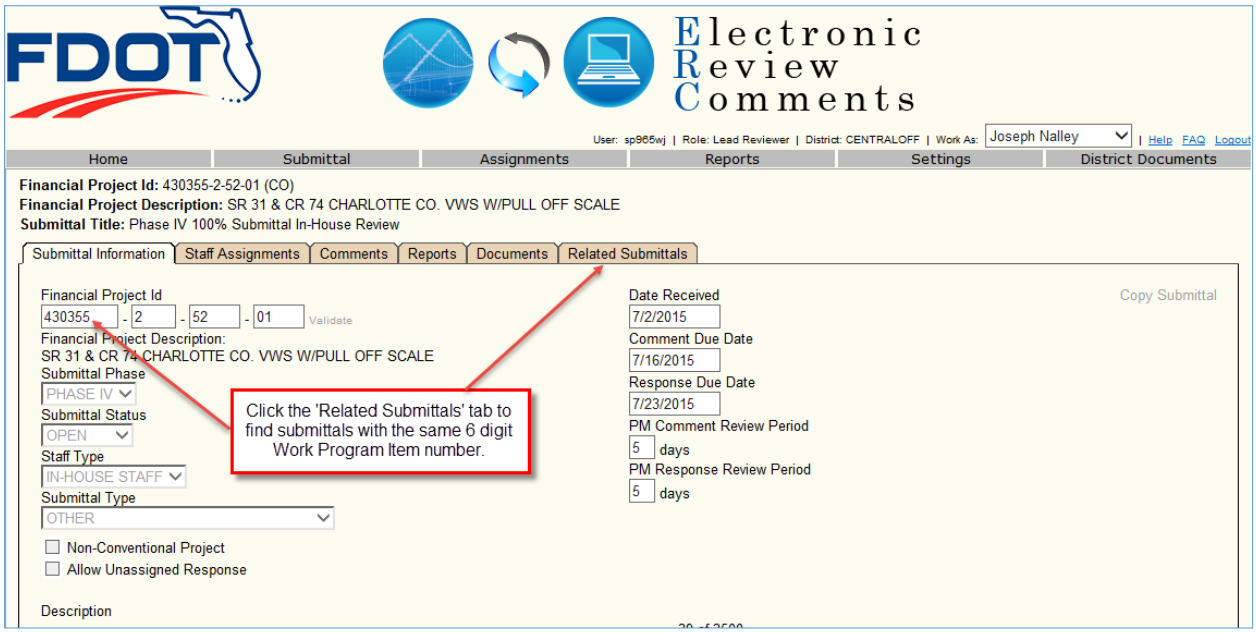


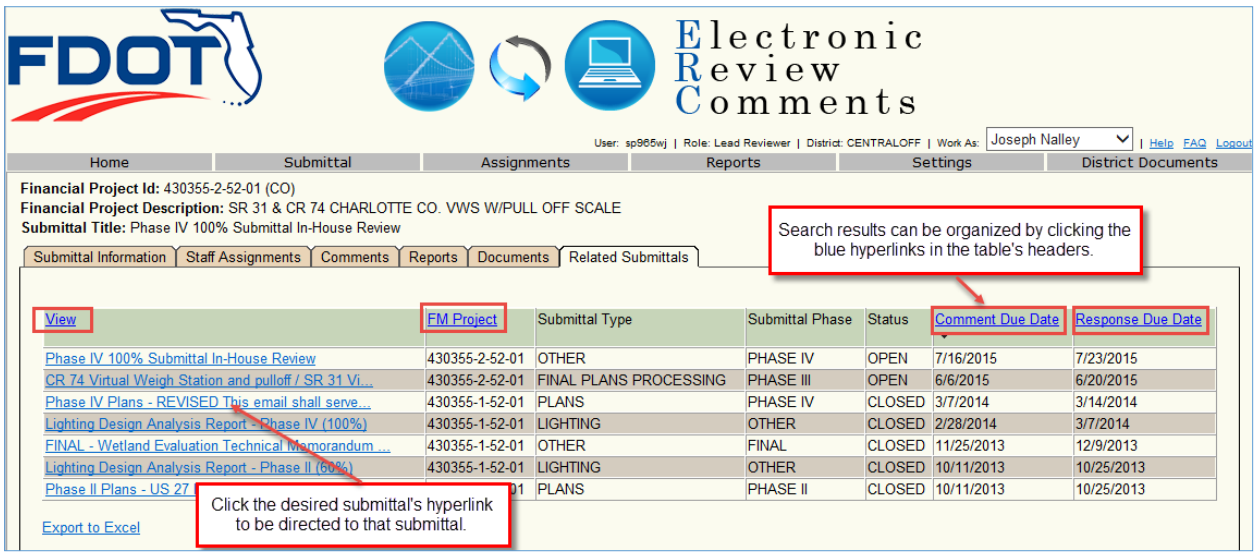
A list of submittals matching the search criteria will be returned. Search screen results can be sorted by the following columns: FM Project, Comment Due Date and Response Due Date.

View	FM Project	Submittal Type	Submittal Phase	District	Status	Comment Due Date	Response Due Date
comments consultant		PLANS	PHASE II	CO	OPEN	6/30/2016	7/30/2016
test comments		PLANS	PHASE III	CO	OPEN	6/30/2016	7/30/2016
Test screen text		PLANS	PHASE III	CO	OPEN	6/25/2016	7/25/2016
testing		PLANS	PHASE II	CO	OPEN	6/4/2016	7/4/2016
Testing Design/Build screen	430356-1-52-01	PLANS	FINAL	CO	OPEN	6/2/2016	6/9/2016
Testing FR 15 enhancement	209610-1-52-01	FINAL PLANS PROCESSING	FINAL	CO	OPEN	4/15/2016	4/29/2016
Testing submittal for enhancements	209610-1-52-01	FINAL PLANS PROCESSING	FINAL	CO	OPEN	4/15/2016	4/29/2016
testing enhancement #2	209610-1-52-01	DESIGN VARIATION	INITIAL	CO	OPEN	4/6/2016	4/20/2016
testing enhancements	209610-1-52-01	ACCESS MANAGEMENT REPORT	OTHER	CO	OPEN	4/6/2016	4/28/2016
Testing cut & paste		ACCESS MANAGEMENT REPORT	FINAL	CO	OPEN	3/31/2016	4/30/2016

Related Submittals

This tab allows users to navigate between multiple submittals under the same Financial Project Id. Once a submittal has been selected and the user has been redirected to the active submittal's page, the user can use the **'Related Submittals'** tab to find submittals with similar FPID numbers.



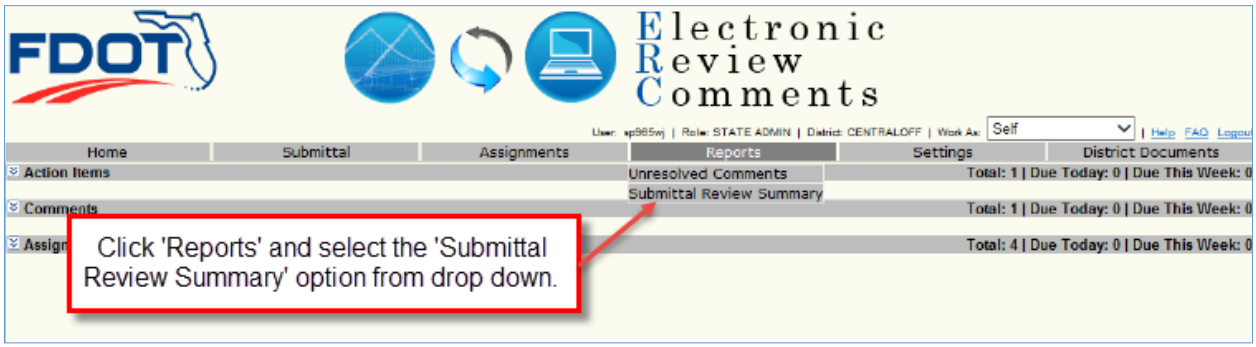


REPORTS

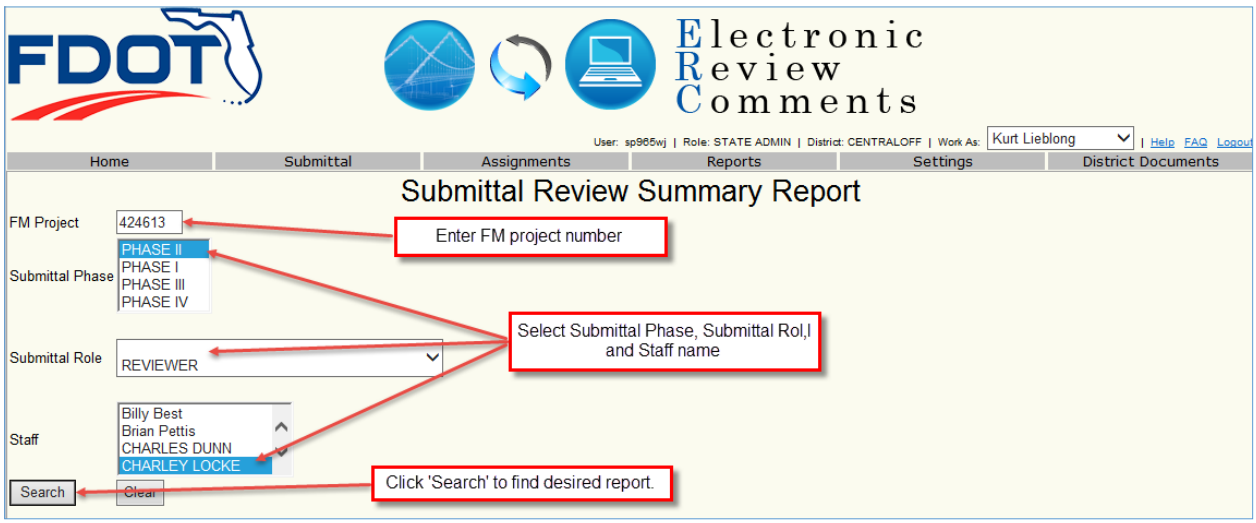
Users can view non-submittal specific reports by selecting the **'Reports'** tab on the menu bar. The '**Unresolved Comments'** and '**Submittal Review Summary'** options will appear in the dropdown. Selecting one of these dropdown categories will open a separate page that requires specific parameters to be entered.

Submittal Review Summary

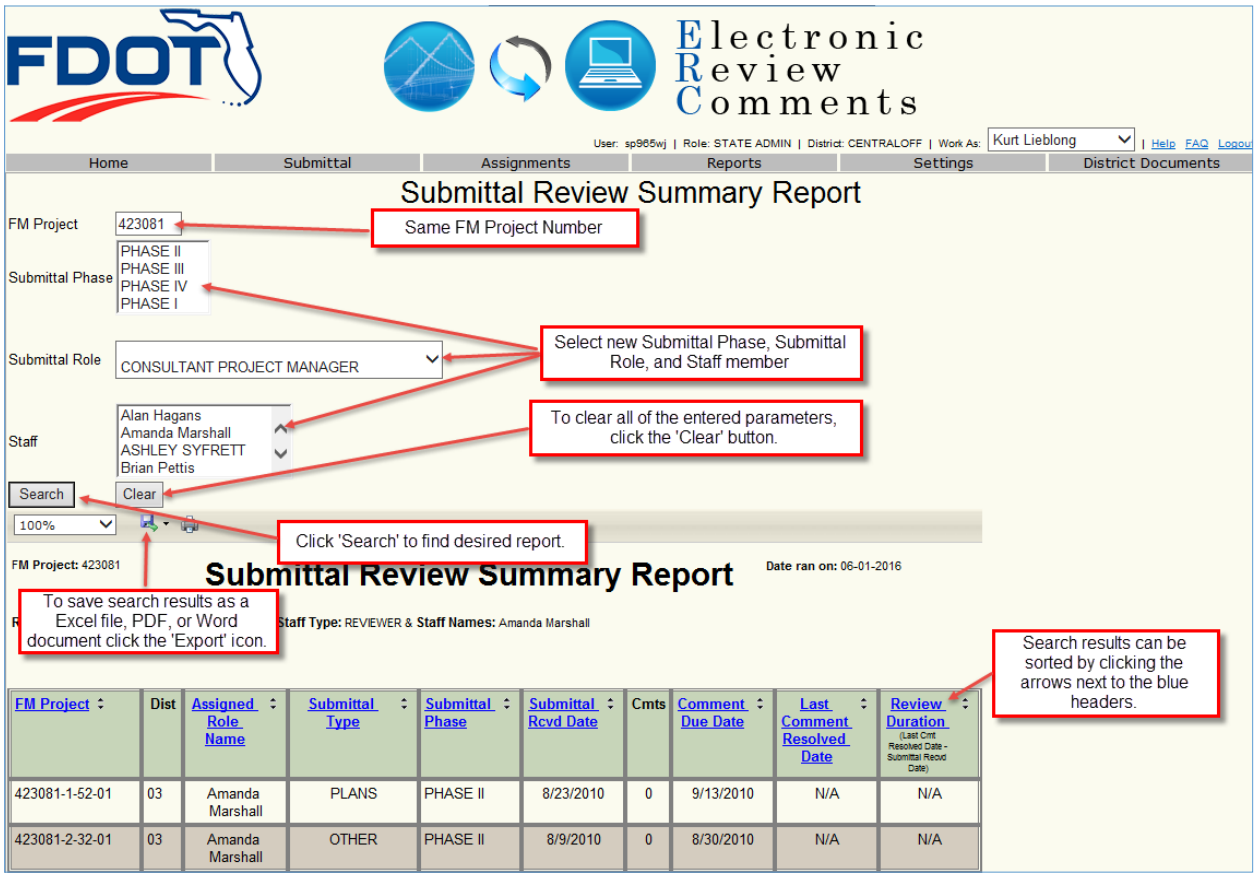
The intent of this report is to provide a tool to track the duration of a submittal review period by FM projects. Select the '**Submittal Review Summary'** dropdown under the '**Reports**' tab on the menu bar.



The required parameters to begin a search are the FM project number, submittal phase, submittal role, and a staff name. Once a FM project number has been entered select the submittal phase, submittal role, and staff name. Click '**Search**' to find desired report.



To run the report again with the same FM project number, select a new submittal phase, submittal role, and staff name and click '**Search**.'

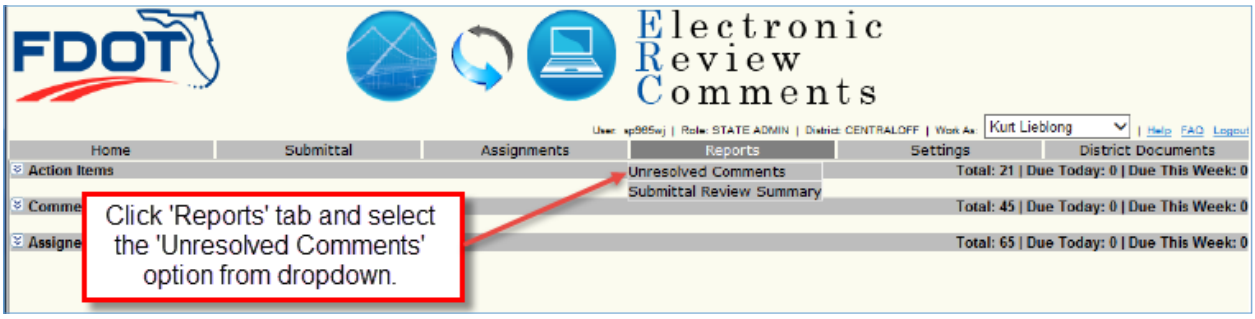


Generally, the review duration is based on the last comment resolved date minus the submittal received date (for closed comments). If the comment is open (not resolved), the review duration is based on the date the report is run minus the submittal received date. The duration is based on calendar days.

Unresolved Comments

The intent of this report is to provide a reporting tool to track and manage unresolved comments. Unresolved comments are not limited to those past the 'response due date' but includes all comments that have not been closed (i.e. comment submitted for response, response in review, etc.). This report, however, will only return results for those unresolved comments that are past due the '**Response Due date**.'

Select the '**Unresolved Comments'** dropdown under the '**Reports**' tab on the menu bar.

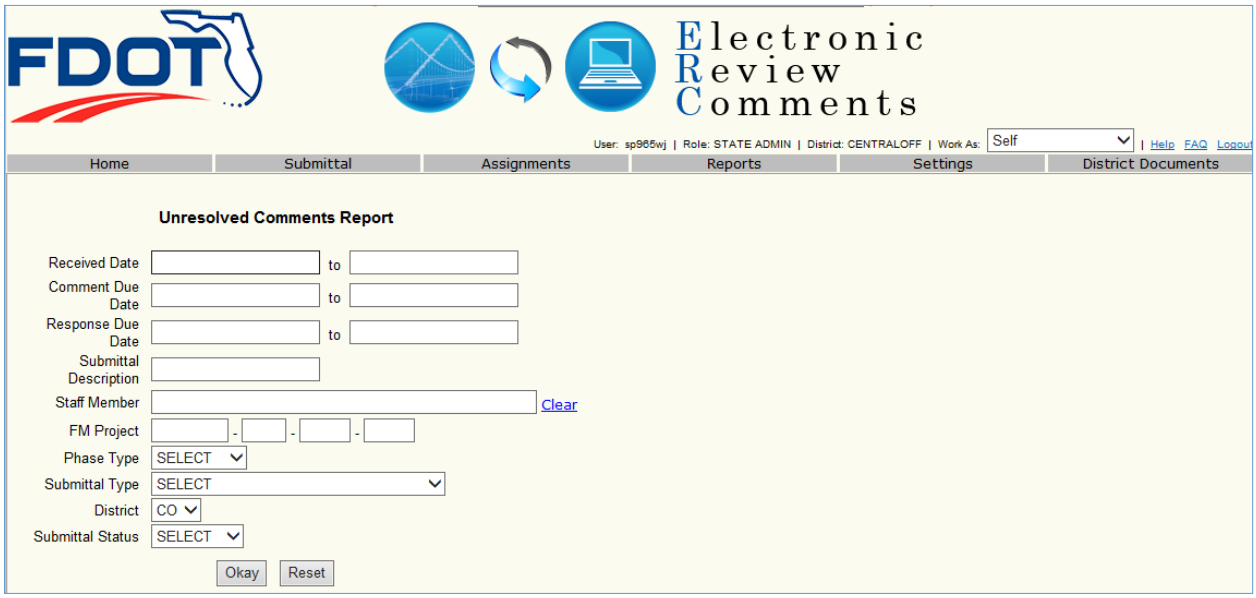


Clicking the 'Unresolved Comments' hyperlink will open the submittal search page and the following criteria will be available to search by:

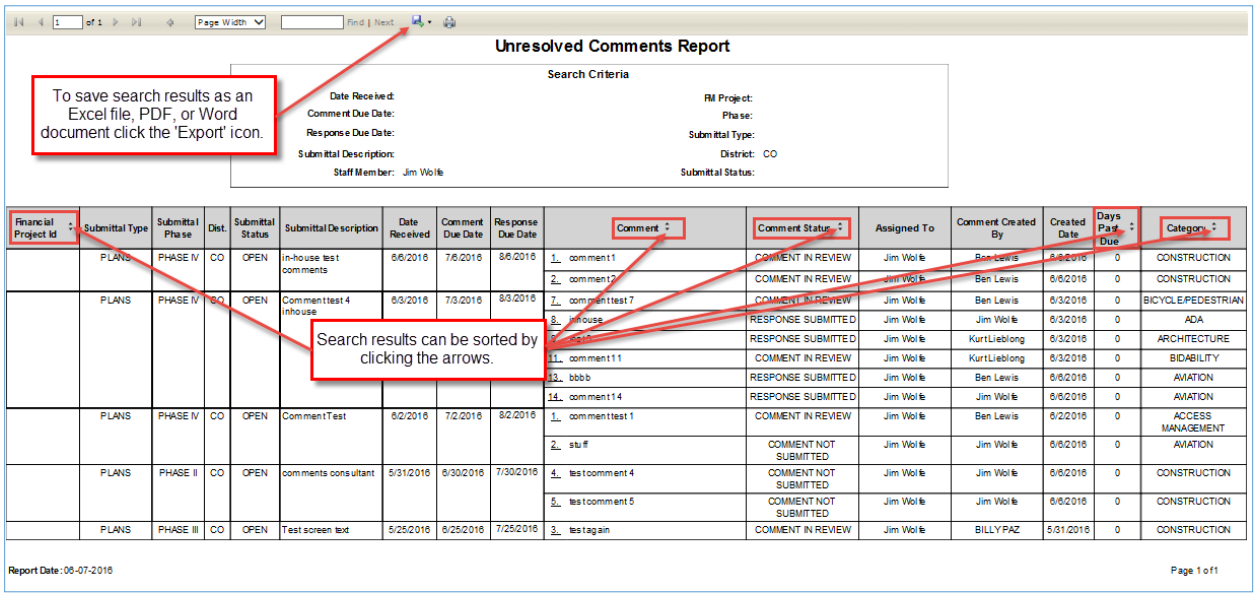
- **Received Date –** Enter a range dates to search for the received date.
- **Comment Due Date** – Enter a range dates to search for the comment due date.
- **Responses Due Date** – Enter a range of dates to search for the response due date.
- **Submittal Description** – Enter text to search for a submittal description.
- **Staff Member** – Begin typing name and then select staff member from returned list.
- **FM Project** – Type in a full or partial FM # (minimum first 6 digits required).
- **Phase Type** – Select from the dropdown.
- **Submittal Type** – Select from the dropdown.
- **District** – Select from dropdown.
- **Status** – Select from dropdown.

Limiting parameters on search criteria – to avoid impacting system performance:

- If all Districts (--) selected, then an RPID or Staff member must be identified.
- If one specific district is selected, then it is not necessary to pick a Staff Member or a Project Number.



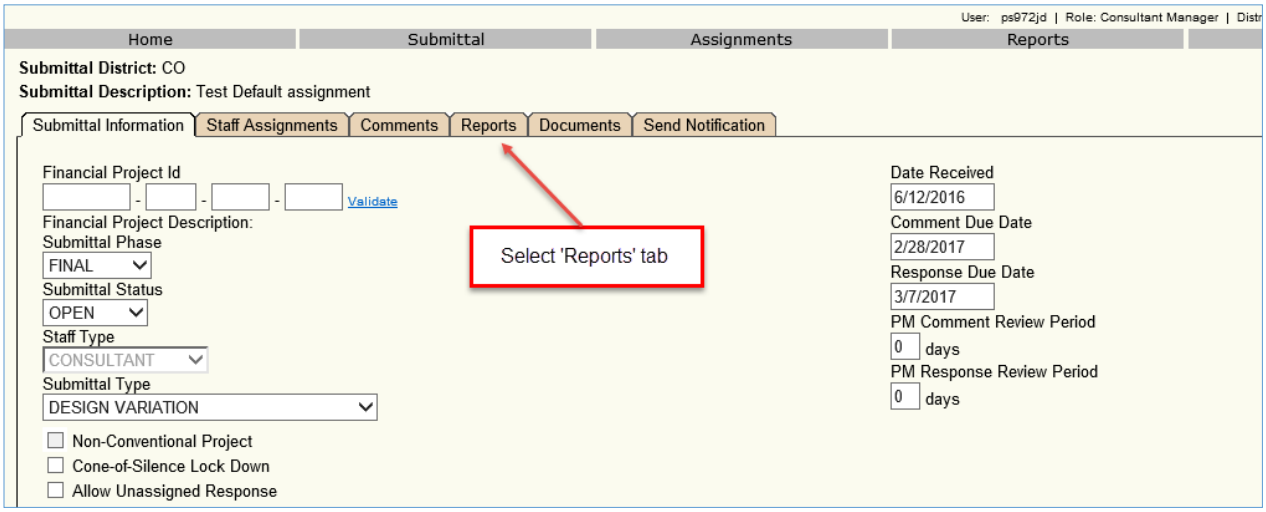
Generated '**Unresolved Comments Report**' will provide a searchable report per: Financial Project Id, Comments, Comment Status, Days Past Due and by Category. The Unresolved Comments Report will be available to both internal and external ERC users.



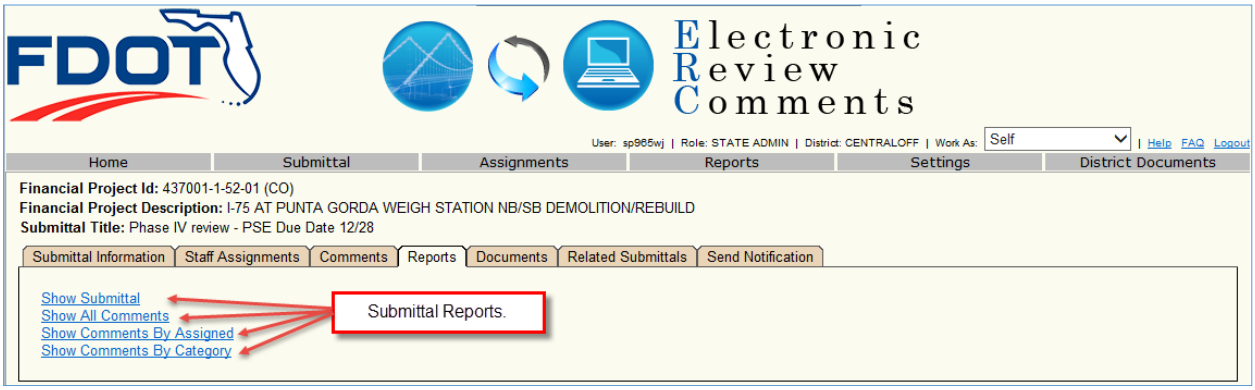
Submittal Reports (Comment by Assigned Reviewer)

The submittal report gives four options to display comments and submittal information for the selected user only.

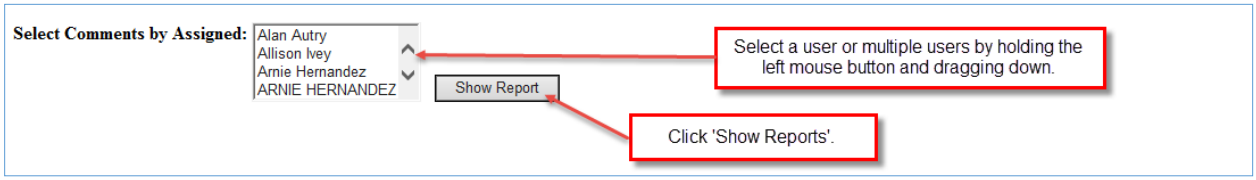
Select the **'Reports'** tab.

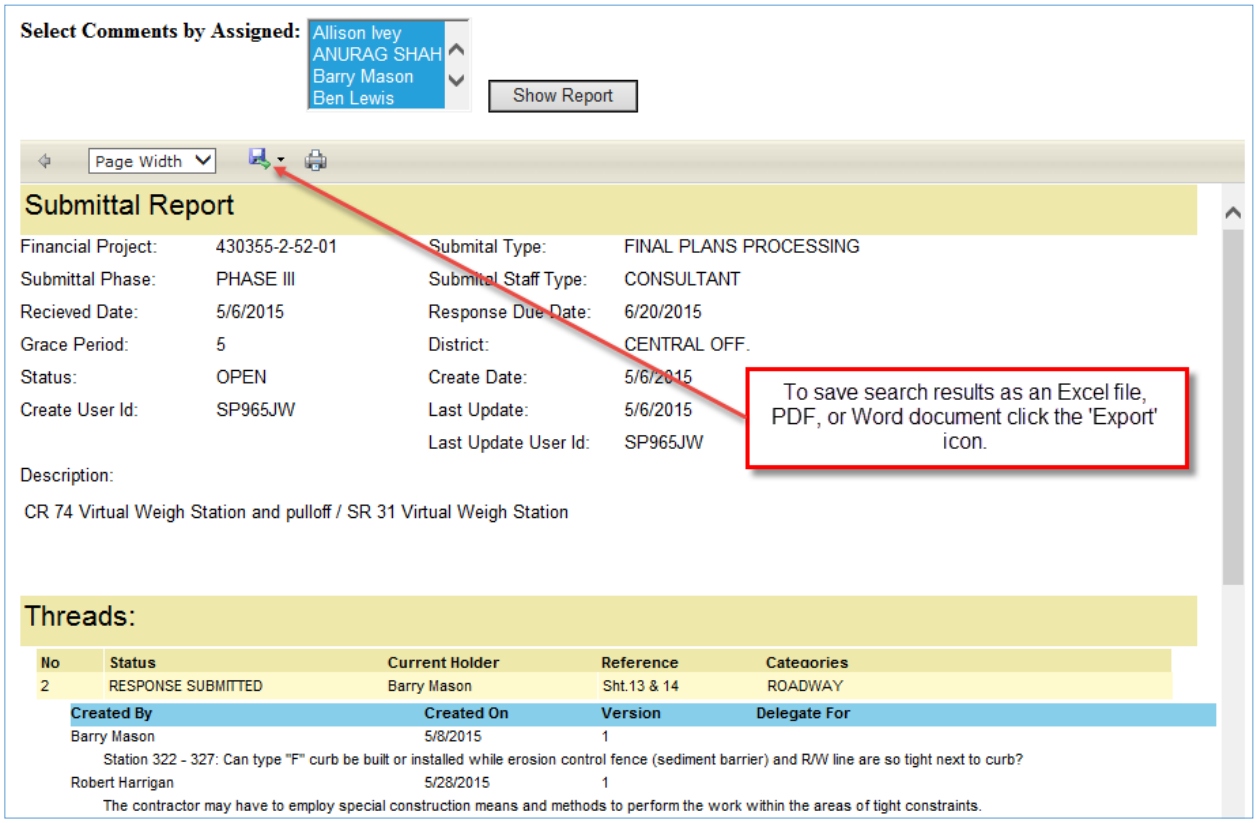


Select the **'Show Comments by Assigned'** submittal report**.**



A new page will open. Select a single user or multiple users by holding the left mouse button and dragging the cursor over the desired user names. Click **'Show Reports'** to find desired report.

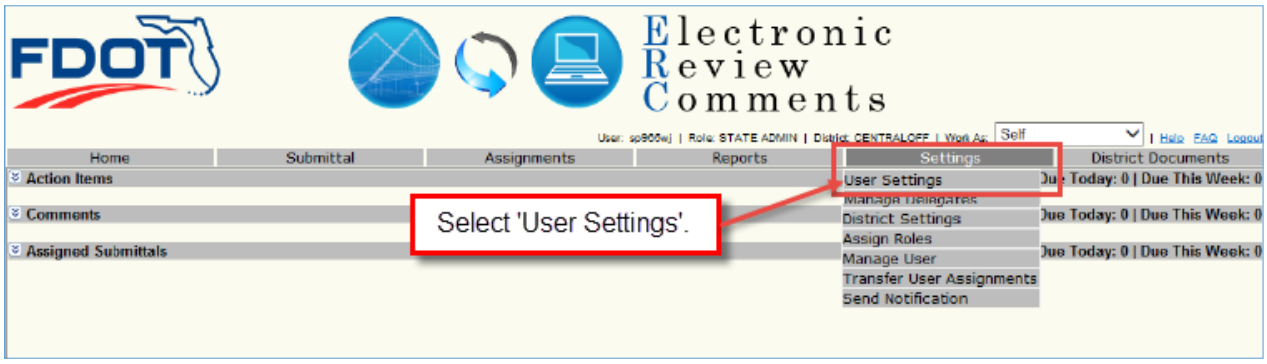




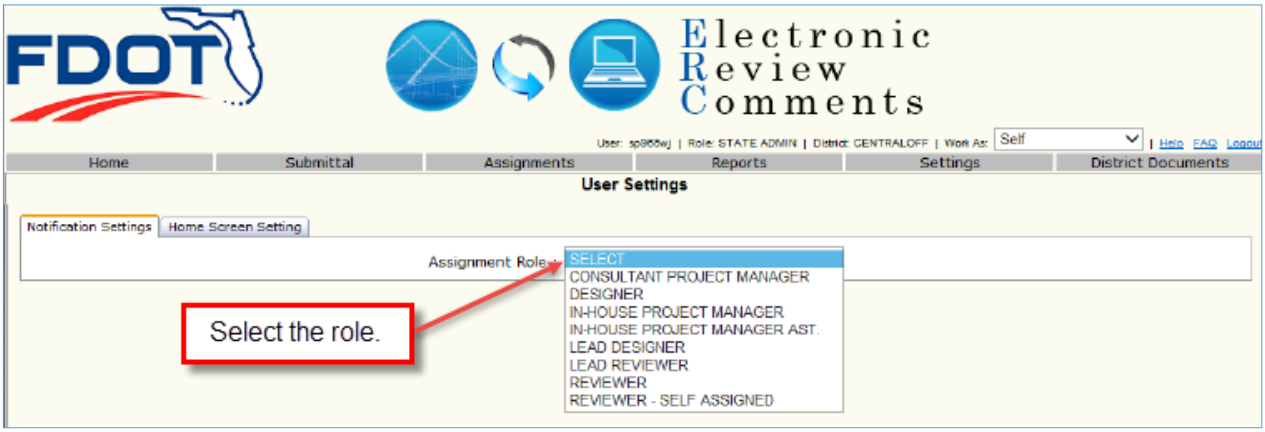
USER NOTIFICATIONS

The ERC system sends email notifications to users to let them know that they need to take a specific action in the system. Users can edit their electronic notifications through the User Settings option. If a user wants to receive additional notifications or fewer notifications when certain actions are taken in the system, they need to set these up on the Notifications Settings screen.

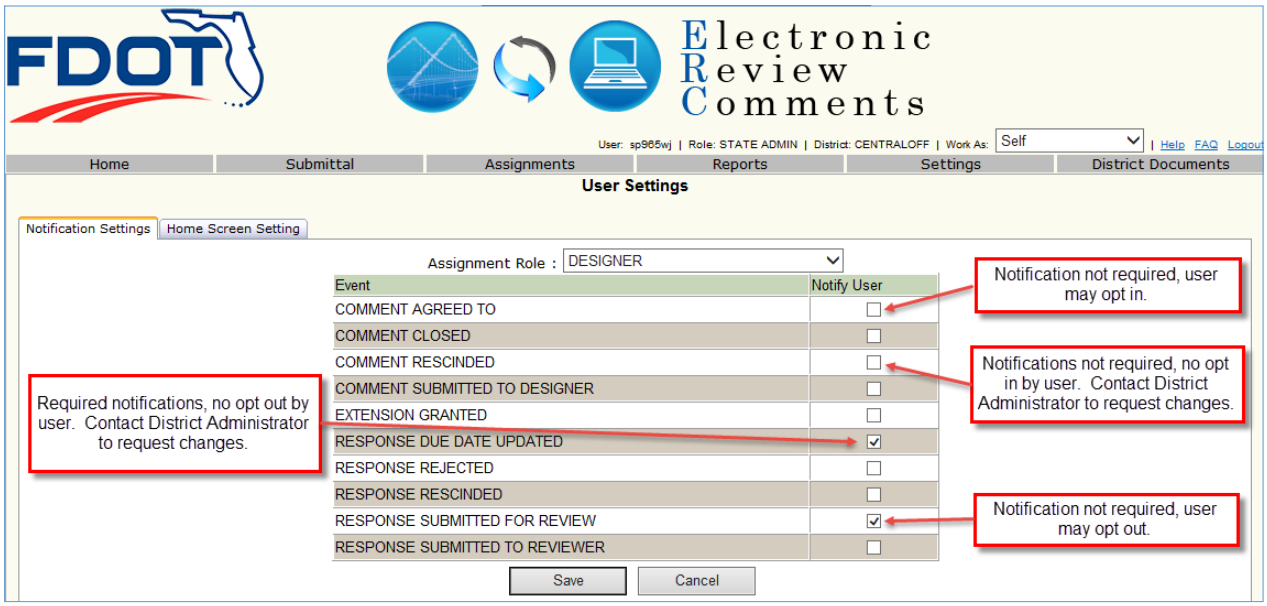
Select '**User Settings'** under the Settings Menu.



The notifications screen will open. Select the role in which you want to modify your notifications.



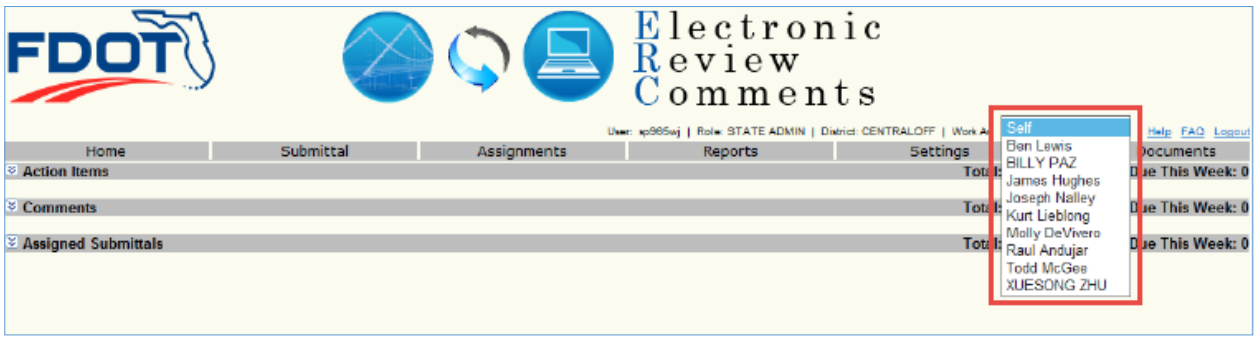
Checkboxes that are checked and enabled indicates the notification is to be received, but is not required. The user can uncheck the box to stop receiving the notification. Checkboxes that are checked and disabled indicates that the notification is required. Checkboxes that are unchecked and disabled indicates that the notifications are not required and the user can't opt in or out. Checkboxes that are unchecked and enabled indicates that the notification is not being received. The user can check the box to begin receiving the notification. If a box is disabled and a selection cannot be made, only the **District Administrator** can change the District User Notification Settings to enable override.


FDOT
Electronic Review Comments
User: sp965wj | Role: STATE ADMIN | District: CENTRALOFF | Work As: Self | Help FAQ Logout
Home
Submittal
Assignments
Reports
Settings
District Documents
User Settings
Notification Settings
Home Screen Setting
Assignment Role : DESIGNER
Event
Notify User
COMMENT AGREED TO
COMMENT CLOSED
COMMENT RESCINDED
COMMENT SUBMITTED TO DESIGNER
EXTENSION GRANTED
RESPONSE DUE DATE UPDATED
RESPONSE REJECTED
RESPONSE RESCINDED
RESPONSE SUBMITTED FOR REVIEW
RESPONSE SUBMITTED TO REVIEWER
Save
Cancel
Notification not required, user may opt in.
Notifications not required, no opt in by user. Contact District Administrator to request changes.
Required notifications, no opt out by user. Contact District Administrator to request changes.
Notification not required, user may opt out.

DELEGATES

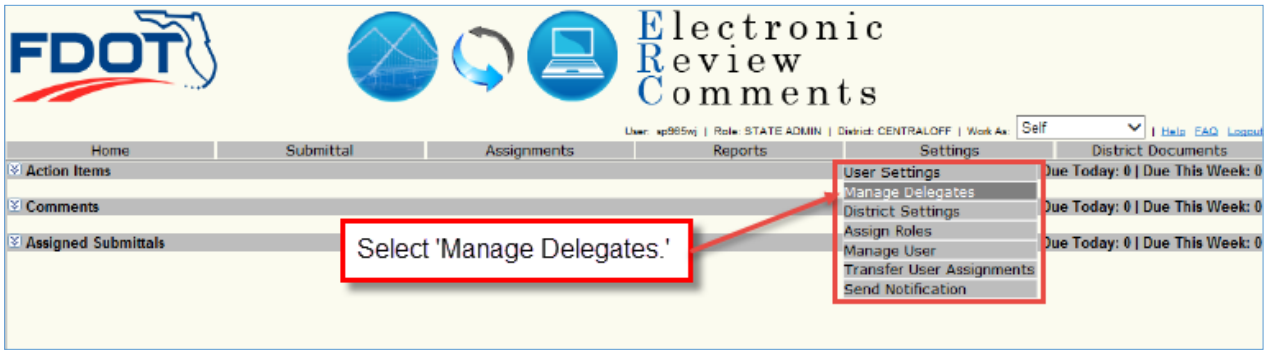
A delegate can be set for any user. Once a delegate is set, the delegate can login to ERC as themselves and work as a delegate for another user. This works the same as the delegates in Microsoft Outlook. If a user is working as a delegate for another user (delegator) and takes action in ERC for that user, the system will show that the action was taken by the delegate working for the delegator.

To work as a delegate for someone else, select that person from the '**Work As'** dropdown box.

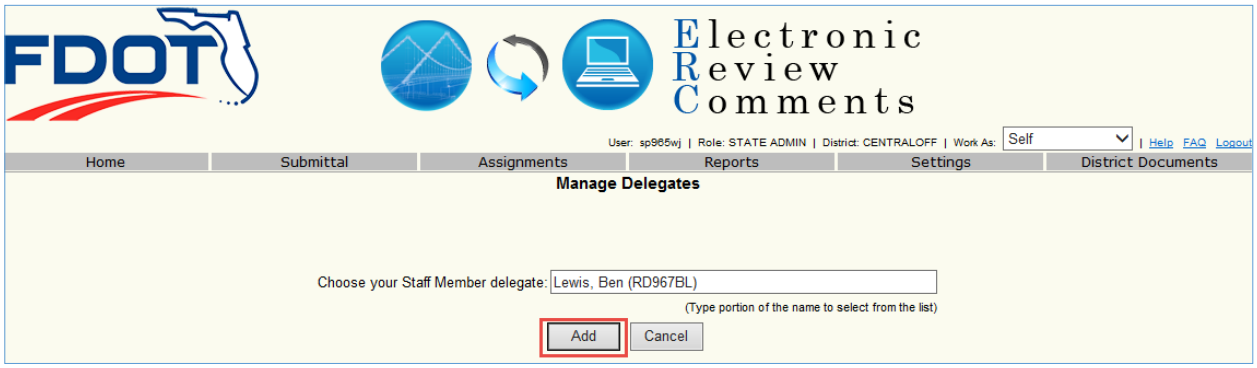


Setting up Delegates

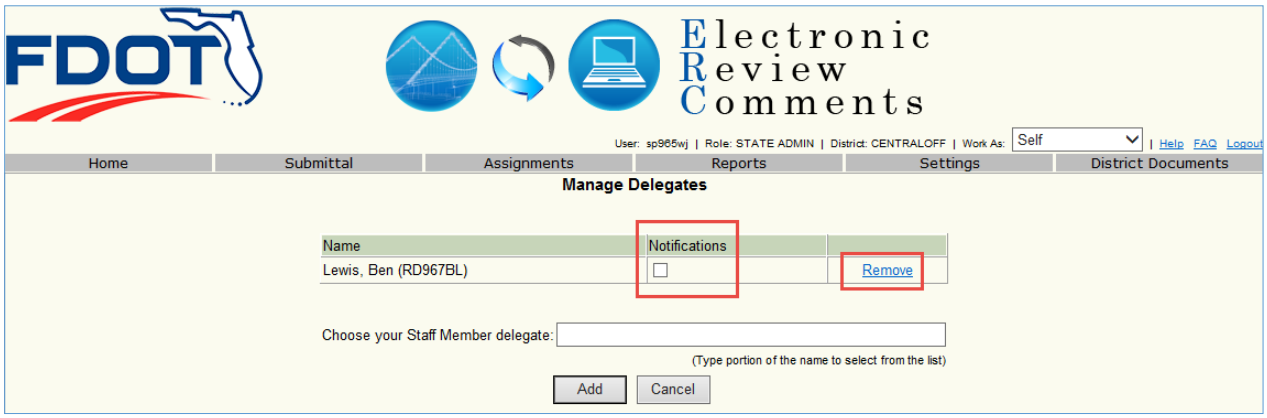
To set up a delegate the delegator will select '**Manage Delegates'** from the Settings menu.



This will open the Manage Delegates page. Type the name of the staff member and select '**Add**'.



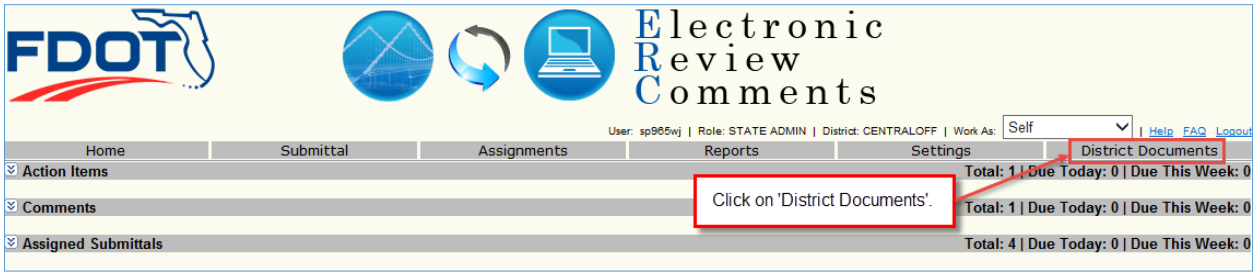
The Delegator can check the '**Notifications**' checkbox to select whether or not the Delegate is to receive the Delegator's notifications. To remove a delegate click the '**Remove**' hyperlink.



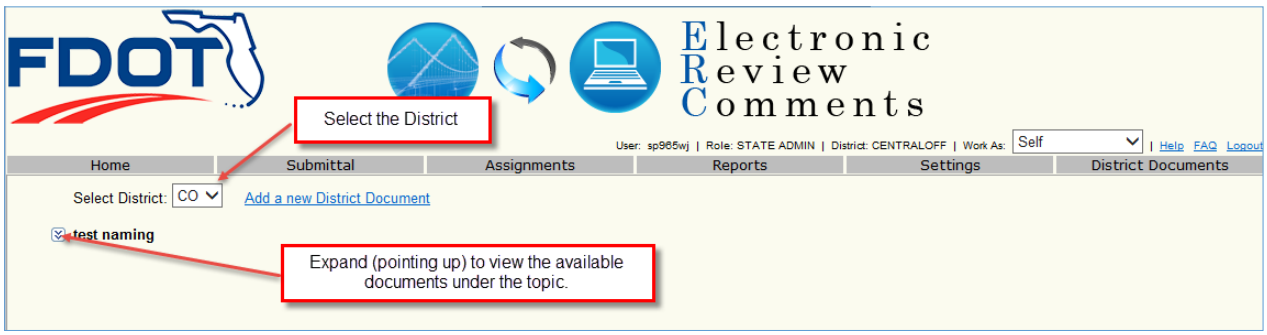
The Delegate will receive all notification emails that would be received by the Delegator, regardless of the Delegator's User/District Setting.

DISTRICT DOCUMENTS

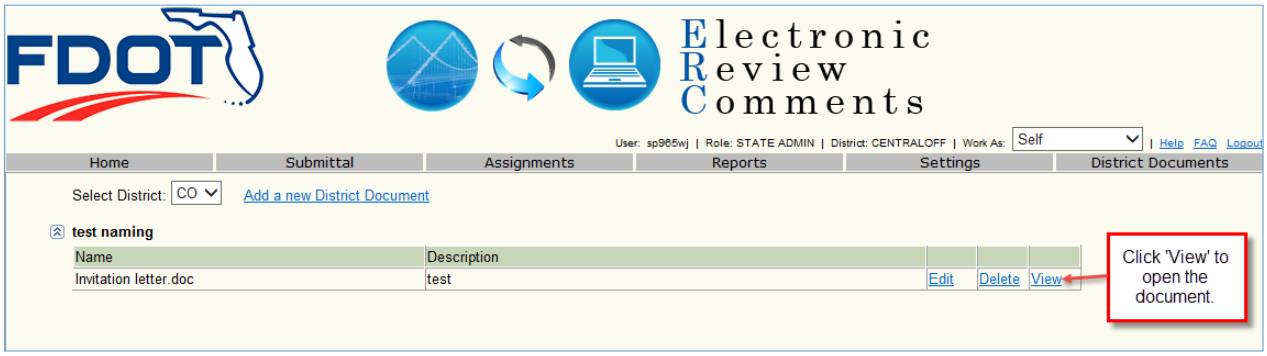
Users can download district specific documents. To download these documents click on '**District Documents'** tab on the menu bar.



This will open the District Documents page. Select the District under the dropdown and then find the desired document topic that is returned. Expand the topic to view the available documents for that topic.

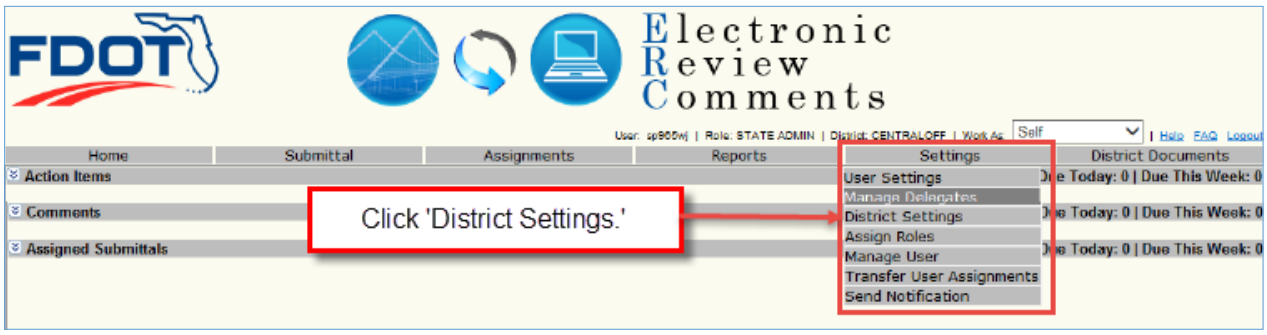


Click view to open the document.



DISTRICT SETTINGS

The Districts have the ability to set some system settings that apply to the entire district. The District Administrators can set these settings by selecting **'District Settings'** from the Settings menu to open the District Default Settings screen.



Default Settings

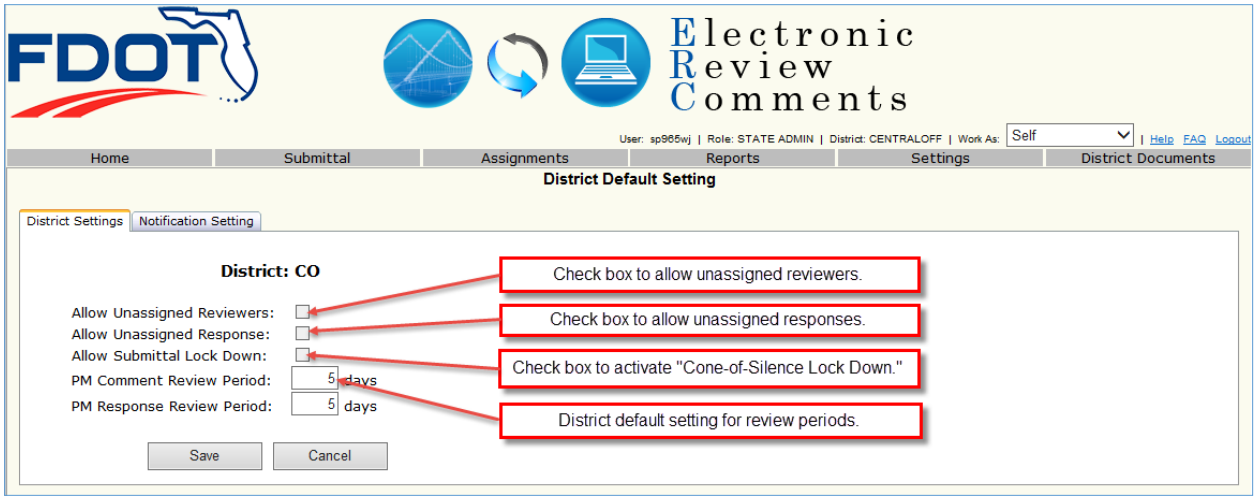
The District has the following options:

- **Allow Unassigned Reviewers –** This will allow users that are not specifically assigned to the submittal to submit comments on the submittal. All comments submitted by unassigned reviewers will be assigned to the In-House PM for action.
- **Allow Unassigned Response –** This will allow any designer assigned to a submittal the ability to respond to any comment that is assigned to the Consultant PM for consultant type submittals and the In-House PM for the in-house type submittals.
- **Allow Submittal Lock Down – "C**one of Silence Lock Down" to be used by District Administrators, In-House PM and/or the Submittal Creator to allow the district to restrict access to comments and responses to unassigned users. Unassigned users will be able to see that the submittal exists but when selected the Submittal Info note will show: "The selected Submittal is under Cone-of-Silence Lock Down."

  On the Submittal Information screen, the check box can be unchecked at any point in time. Real life scenario – In-House PM / District Admin / Submittal Creator checks "Cone-of-Silence Lock Down" check box for DRAFT Request for Proposal reviews by in-house design staff. After design-build contract is executed, In-House PM / District Admin unchecks the "Cone-of-Silence Lock Down" checkbox on all submittals reviewed during acquisitions.

  In the District Setting Screen, District Administrators will have ability to disable the Allow Submittal Lock Down check box if the following is true: the Check box is currently check (lock down is allowed) and there are not any active submittals that are locked.
- **PM Comment Review Period –** This review period is used to allow time for the In-House PM to review submitted comments before they are assigned to the designers. After the period has elapsed, if the PM has not taken action the comments will automatically be assigned to the designers. During the review period the Consultant PM will not be able to see the comments that have not been submitted to the Designers by the In-House PM. They will not show up on submittal reports by the Consultant PM until the expiration of the review period.

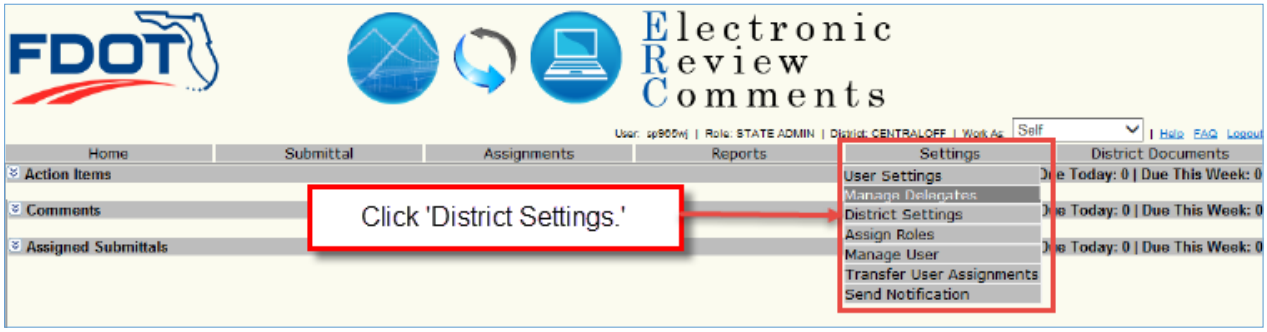
- **PM Response Review Period –** This period is used to allow time for the In-House PM to review submitted responses before they are assigned to the reviewers. After the period has elapsed, if the PM has not taken action the responses will automatically be assigned to the reviewers.



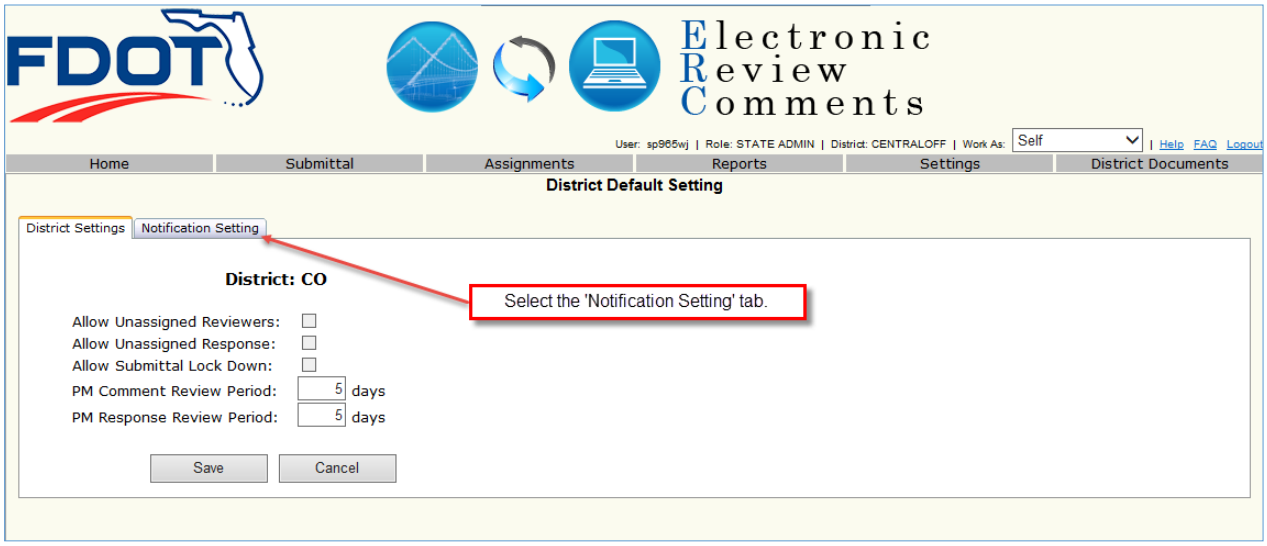
Notification Settings

The Notification Setting tab will allow the Districts the ability to require users to get additional notifications that they may not automatically receive, and not allow the user to opt out of theses notifications. The District Default Settings will only function for those assigned users using a RACF account (also known as mainframe). If the assigned user is included on submittals in multiple Districts then the user's default District settings will govern. For all assigned users using an ISA account (Internet Subscriber Account email address) the District Default Settings will not function and all notifications will be controlled via the user settings (i.e. District can't make notifications mandatory, users control email notifications**). These are global settings and are not tied to a particular submittal. A change in District Default Settings will impact all users in that District for that associated role change. These changes will affect previously set user settings.**

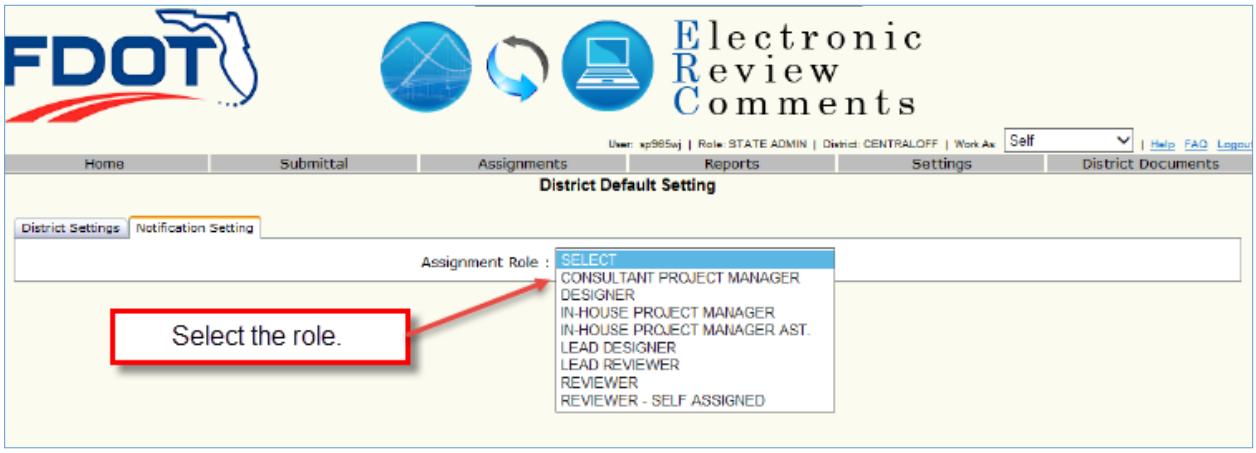
Select the **'District Settings'** option under the **'Setting'** tab on the menu bar.



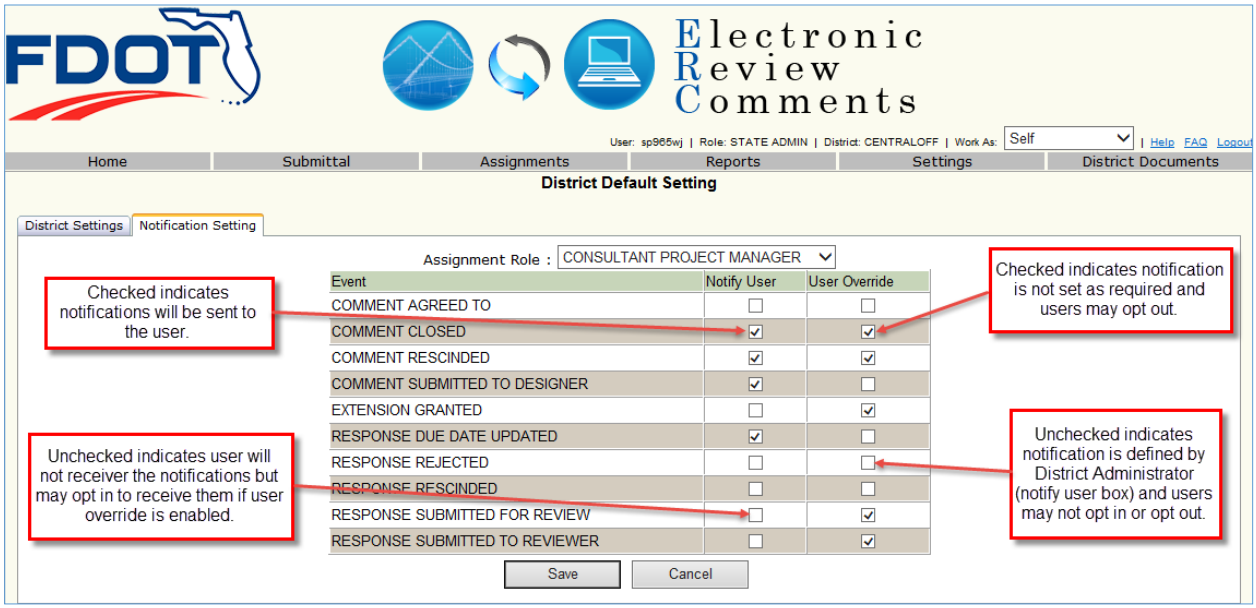
Select the **'Notification Setting'** tab on the District Default Setting screen.



Select the role that you're trying to set the default user notifications.

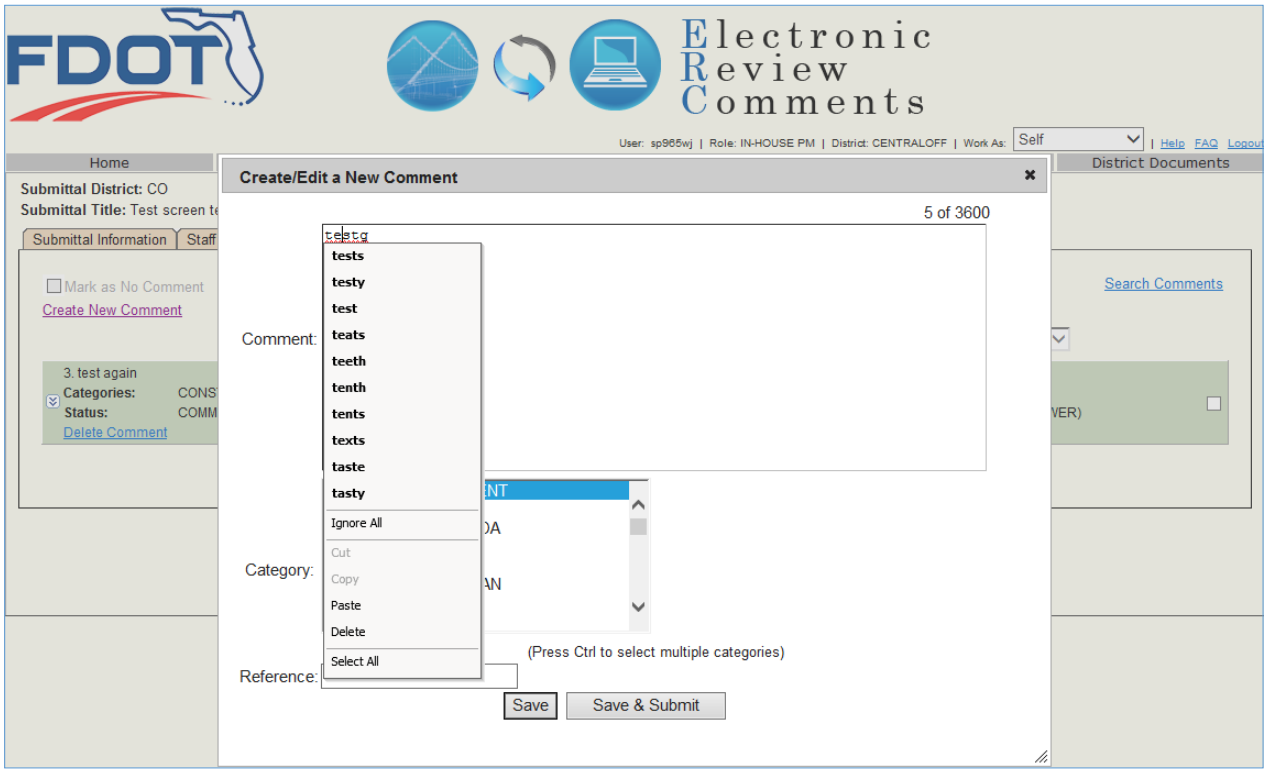


The notification setting page for that particular role will open. The District can select the additional e-mails the users will receive for each role. The District can also allow the users to override those district settings.


FDOT
Electronic Review Comments
User: sp965wj | Role: STATE ADMIN | District: CENTRALOFF | Work As: Self | Help FAQ Logout
Home
Submittal
Assignments
Reports
Settings
District Documents
District Default Setting
District Settings
Notification Setting
Assignment Role : CONSULTANT PROJECT MANAGER
Event
Notify User
User Override
COMMENT AGREED TO
COMMENT CLOSED
COMMENT RESCINDED
COMMENT SUBMITTED TO DESIGNER
EXTENSION GRANTED
RESPONSE DUE DATE UPDATED
RESPONSE REJECTED
RESPONSE RESCINDED
RESPONSE SUBMITTED FOR REVIEW
RESPONSE SUBMITTED TO REVIEWER
Save
Cancel
Checked indicates notifications will be sent to the user.
Checked indicates notification is not set as required and users may opt out.
Unchecked indicates user will not receiver the notifications but may opt in to receive them if user override is enabled.
Unchecked indicates notification is defined by District Administrator (notify user box) and users may not opt in or opt out.

SPELLCHECKER

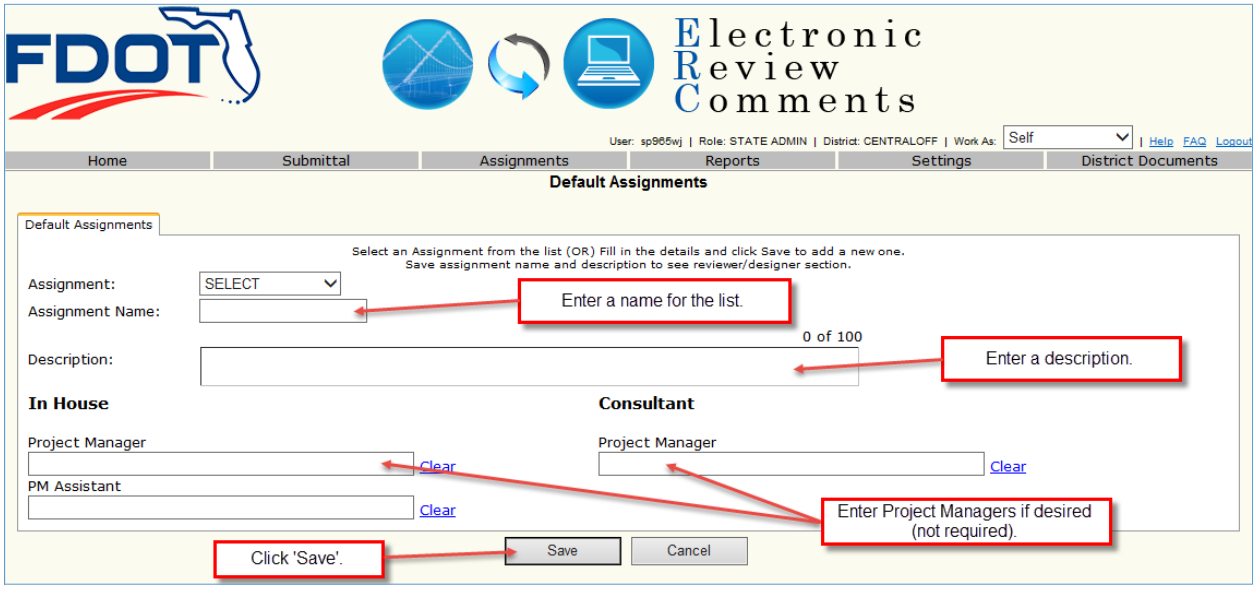
Misspelled words will be underlined with a red squiggly line. By placing the cursor over the word and right-clicking, a list of possible words will be returned from the spellchecker. Select the appropriate word or choose '**Ignore**'.



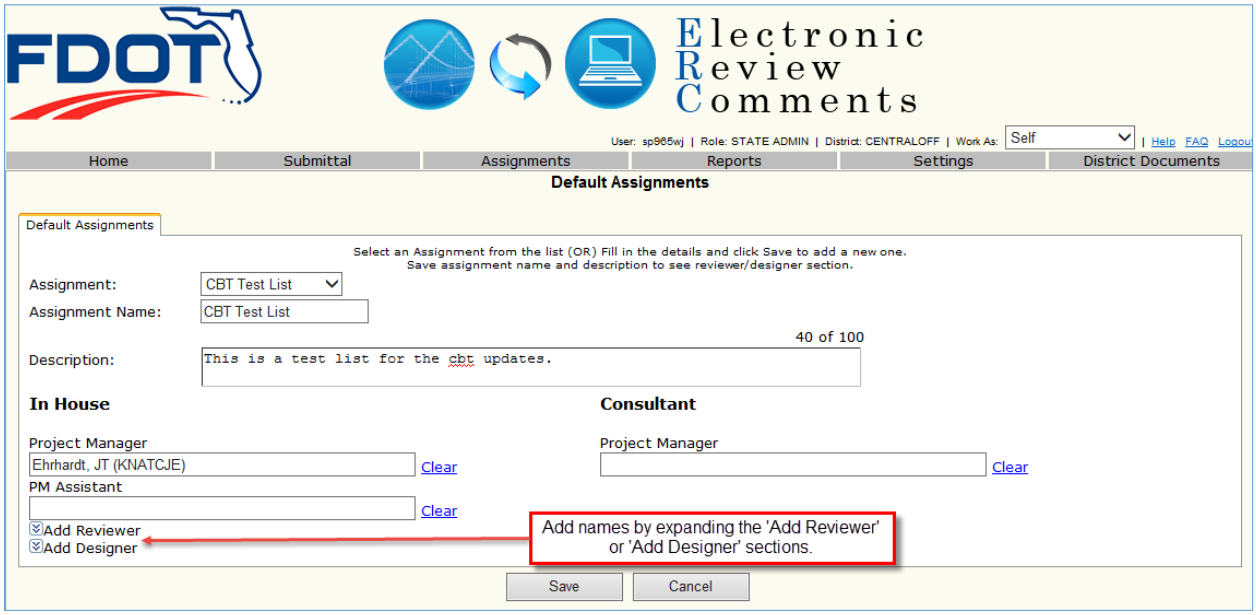
DISTRICT ADMINISTRATOR FUNCTIONS

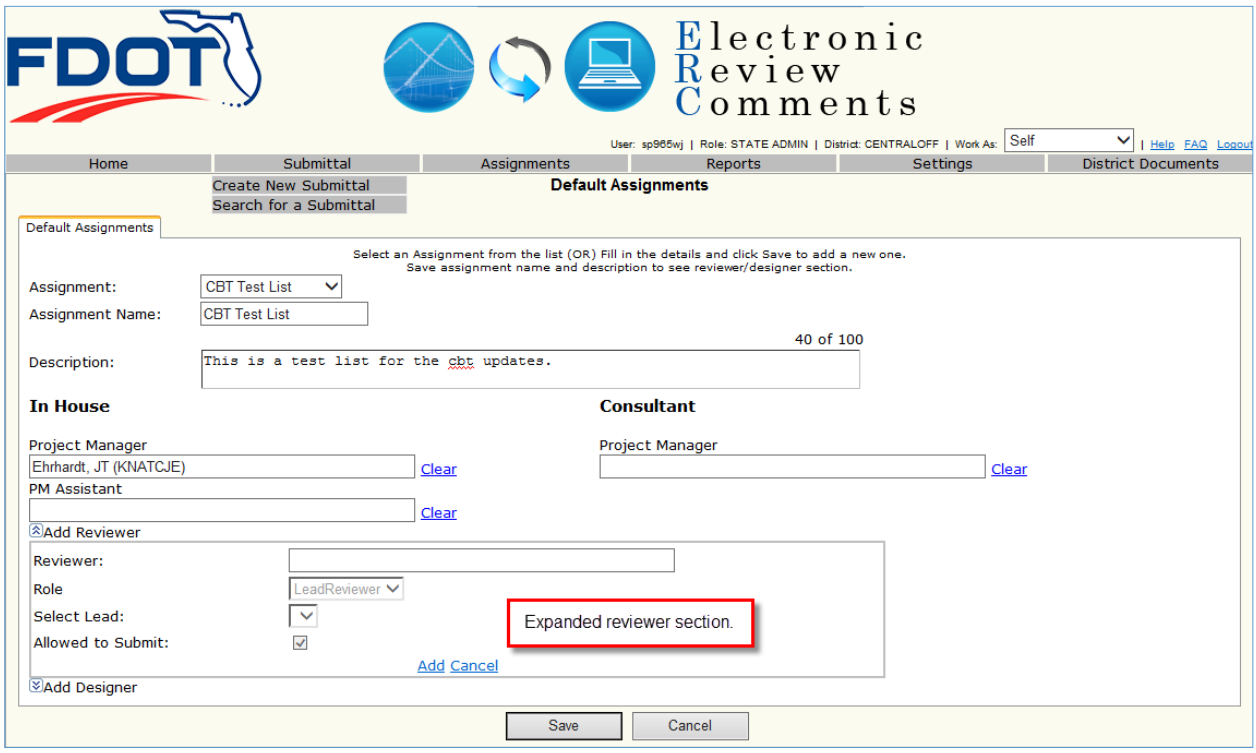
Setting up Default Assignment List

Default assignment lists must be set up by the District Administrators. To set up a default assignment list, select the Assignments menu which will open the Default Assignments page. Enter list name, description, project managers (not required) and select save.



Staff can be added by expanding the reviewer or designer section, completing the required information and saving the changes. Refer to the section on staff assignments for more detail on adding staff.



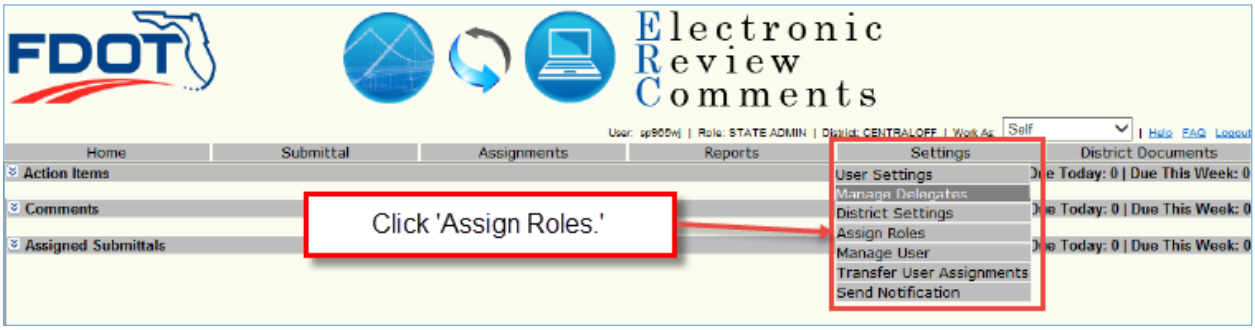


Assigning Roles

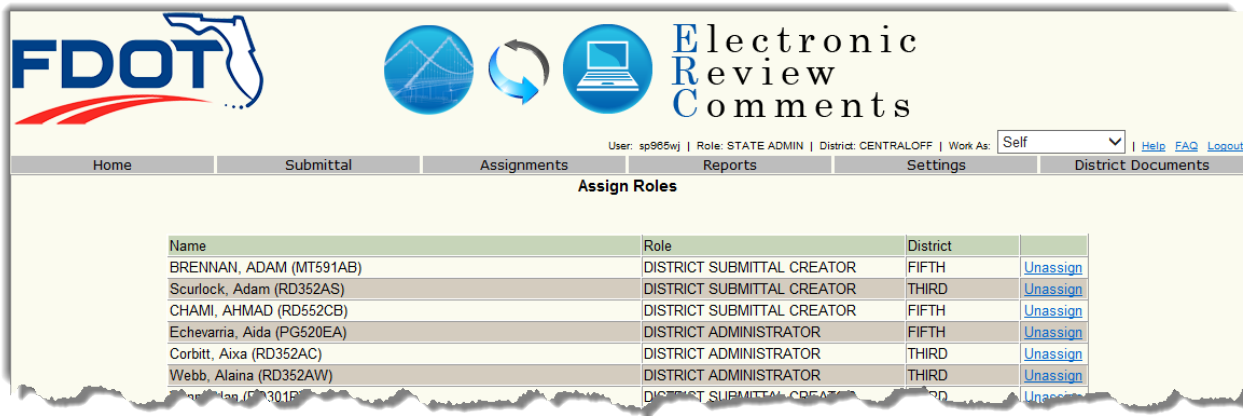
The District Administrator can assign the following roles to other users:

- **District Administrator** – Recommend having multiple District Administrators
- **Submittal Creator** – This role is given to users in the District that have the need to create submittals, such as Project Managers, but do not need the permissions granted the District Administrator.
- **Primavera Scheduler** – This role is given to the scheduler in the district, so that they will be notified of submittal date changes.

To assign a role to another user, select '**Assign Roles'** from the Settings menu.



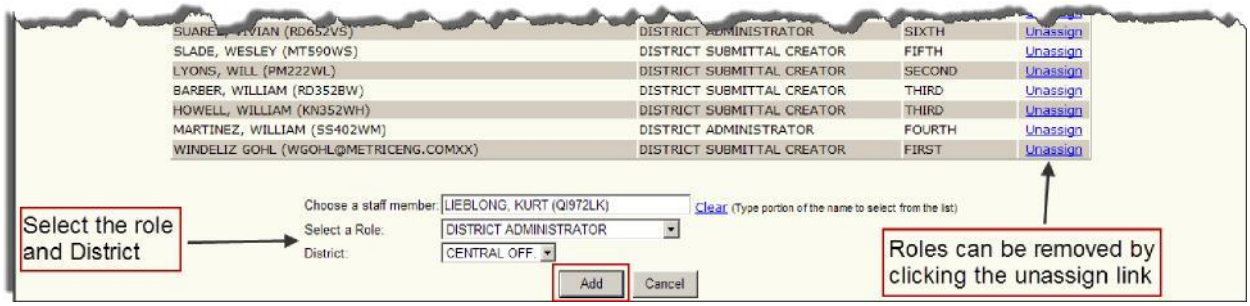
This will open the Assign Roles screen.



Scroll to the bottom.

Begin typing staff name and choose correct staff from returned list.

Select the role and the District and click the '**Add**' button. A role can be removed from a user by clicking the unassign link.

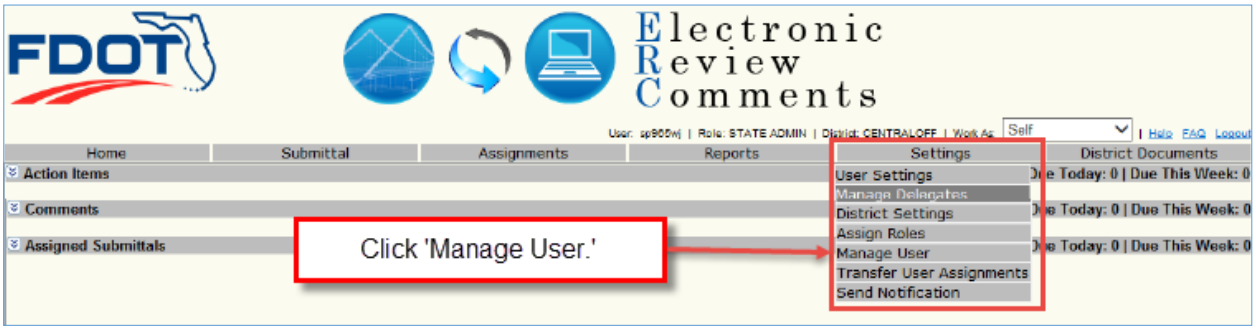


Manage User Option

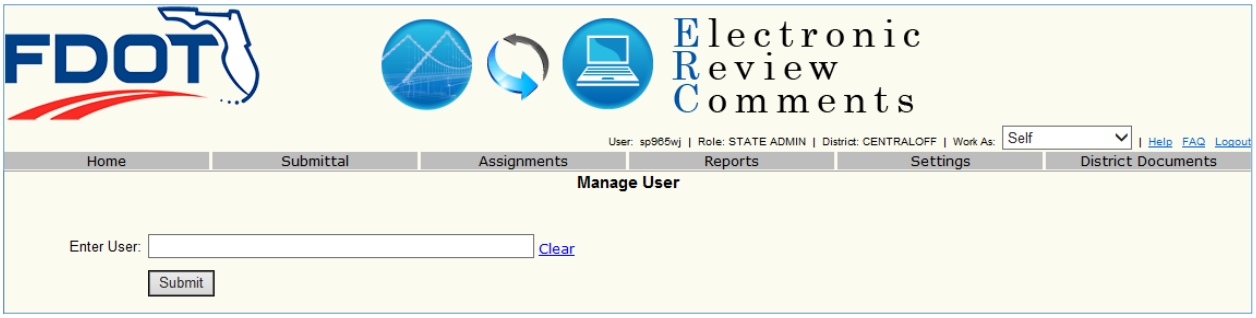
The Manage Users Screen allows the following functionality for the District Administrators:

- Display phone number and e-mail address for a user.
- Ability to add delegates for a user. The District Administrator could add themselves as a delegate for a user and then work as that user to troubleshoot problems.
- Ability to transfer assignments to another staff member. A log will display on the screen that will show all transferred assignments and any that could not be transferred with a message as to why they could not be transferred.

Select '**Manage Users'** from the Settings menu.

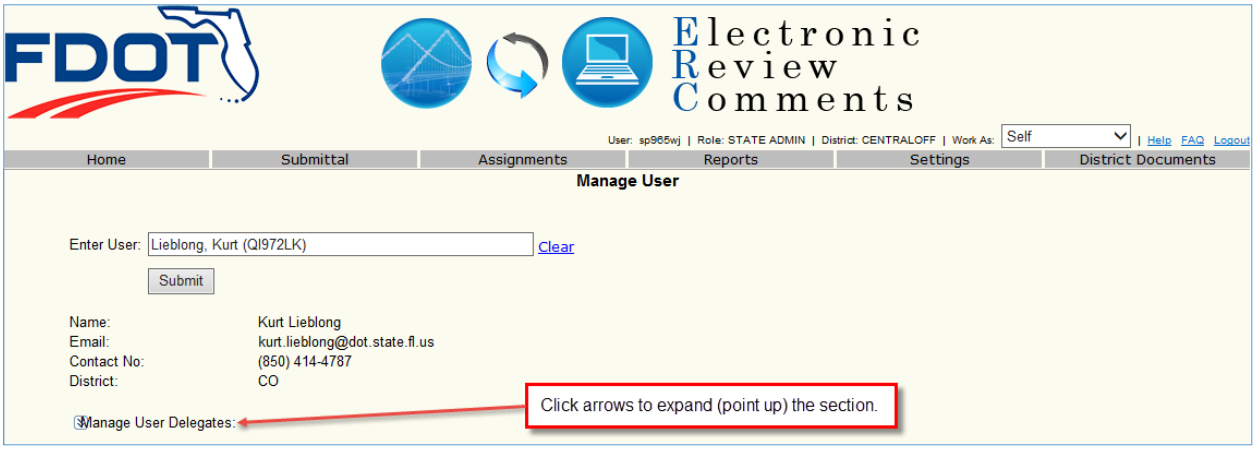


This will open the Manage Users Screen.



Begin typing a staff name in the **'Enter User'** box and select correct staff from returned list. Click the submit button.

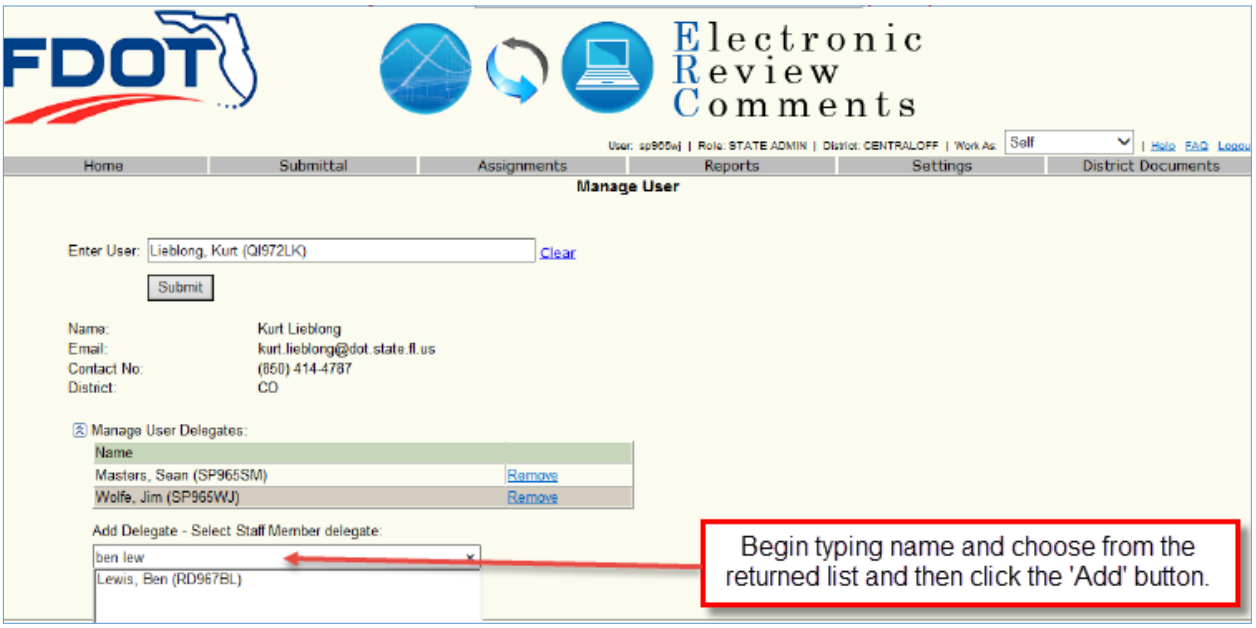
The users name, e-mail address, phone number, and District will be displayed on the screen, along with a **'Manage User Delegates'** feature.



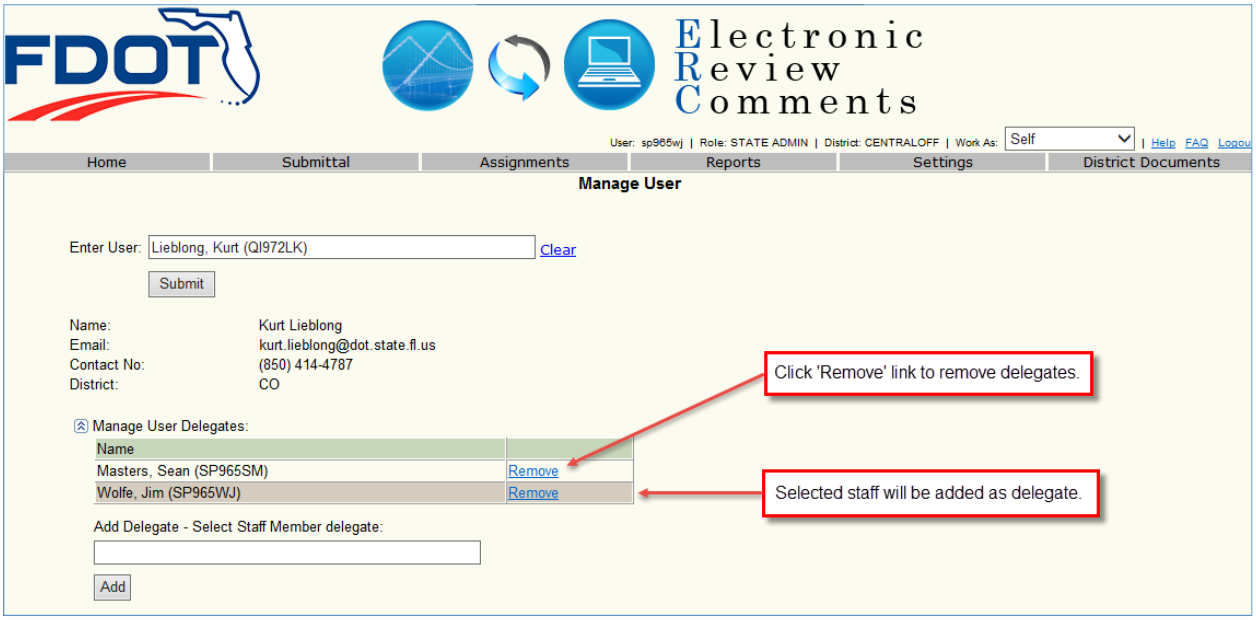
Manage User Delegates

The '**Manage User Delegates'** feature allows District Administrators to manage the delegates of other users. This feature also allows the District Administrator to assign themselves as a delegate for another user and then work as that user to troubleshoot problems.

To add a delegate for the selected user, begin to type the staff name in the **'Add Delegate'** box and select the correct staff from the returned list. Click the '**Add**' button.



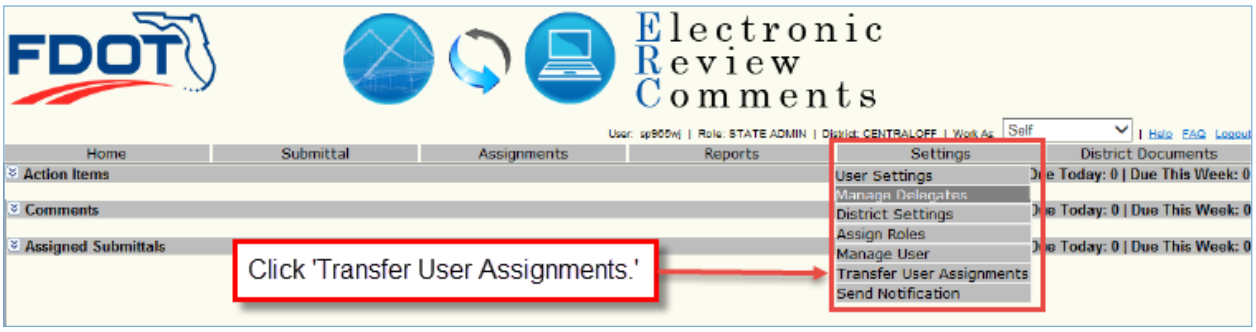
The selected staff will be added as a delegate. To remove a delegate, click the '**Remove**' link next to their name.



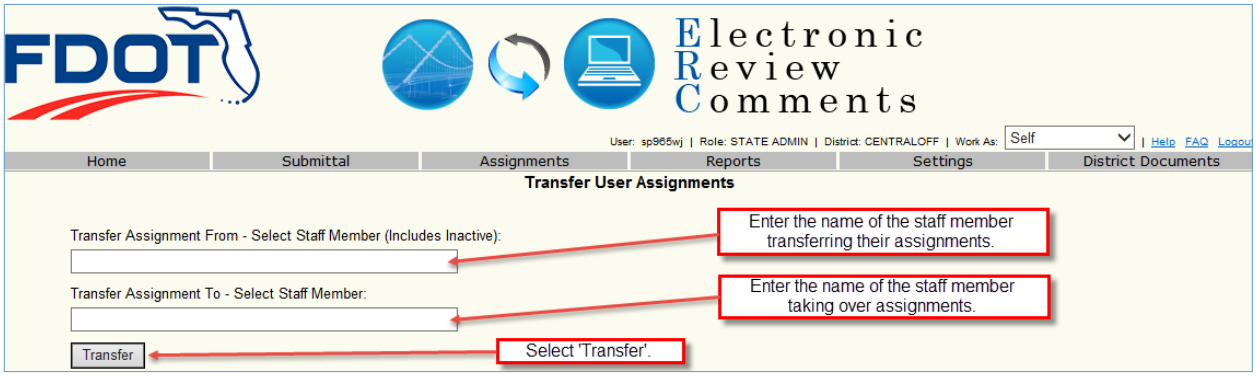
Transfer User Assignments

This feature allows a District Administrator to transfer all the active assignments from one user to another user. This can be used as users leave their positions and new users' takeover their responsibilities.

To transfer the active assignments of the selected user to another user, select '**Transfer User Assignments'** from the Setting menu.

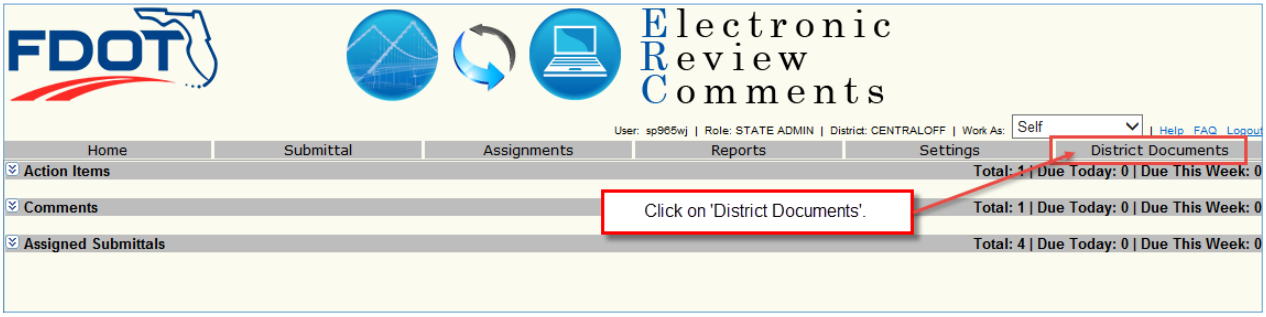


Enter the name of the staff member transferring their assignments in the top text box and enter the name of the staff member receiving the assignments in the bottom text box.

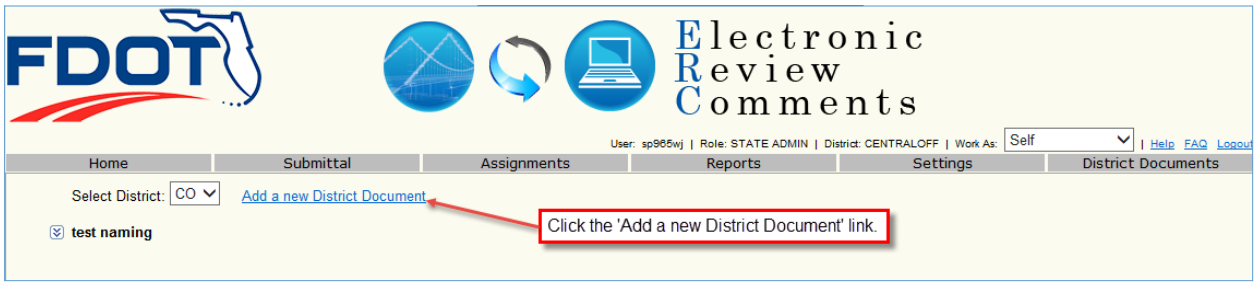


Adding District Documents

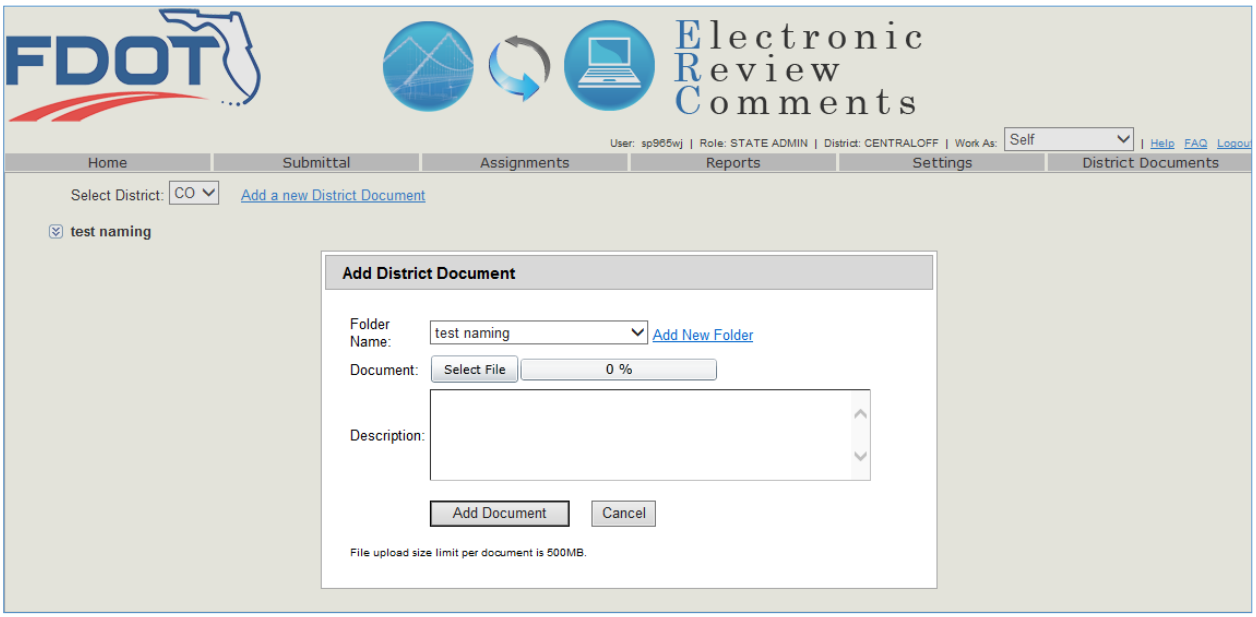
The District Administrators are responsible for maintaining the District Documents. To add documents to this page, select District Documents.



This will open the District Documents page. Click on the '**Add a new District Document'** link.



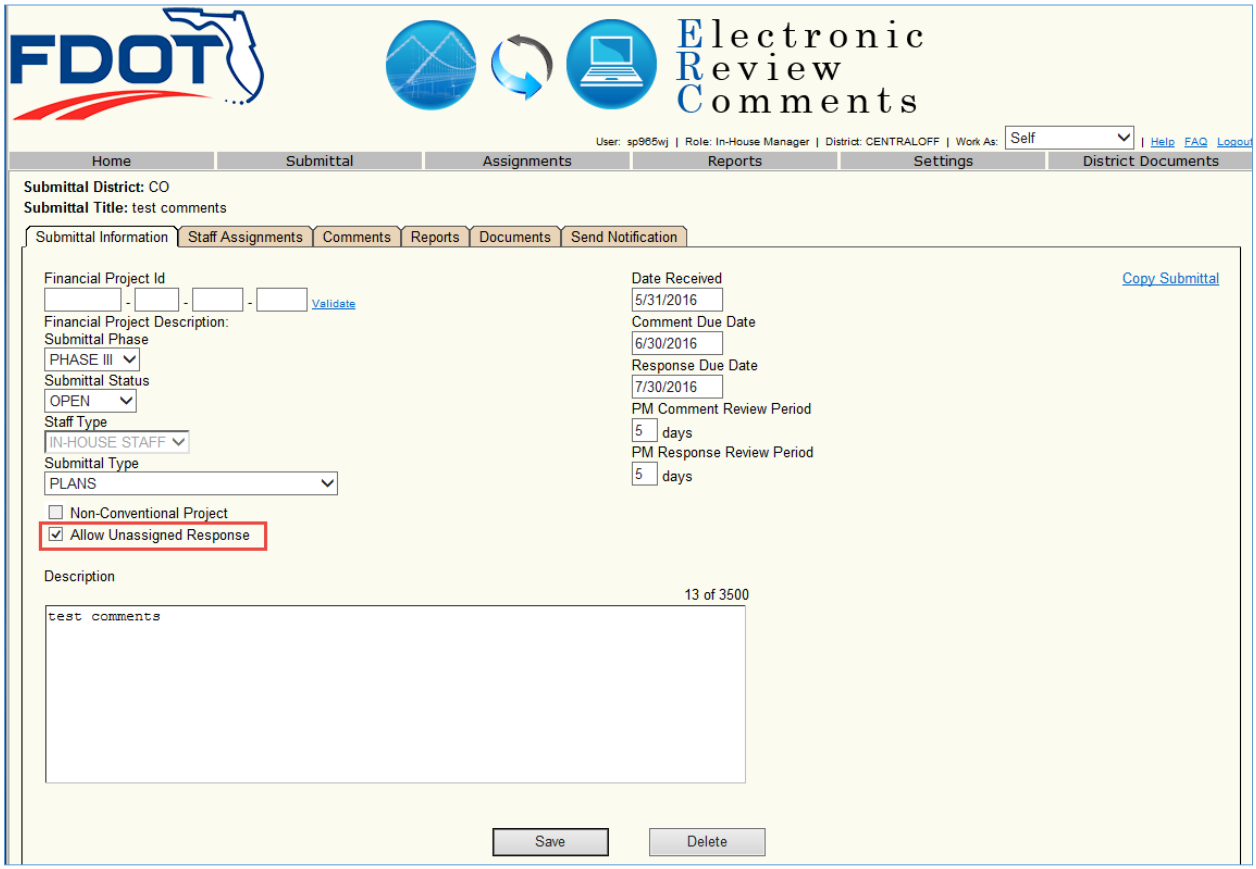
Select the folder for the document or create a new folder. Select the file to upload to the ERC. Type a description in the description text box and click the **'Add'** button.



Unassigned Responses

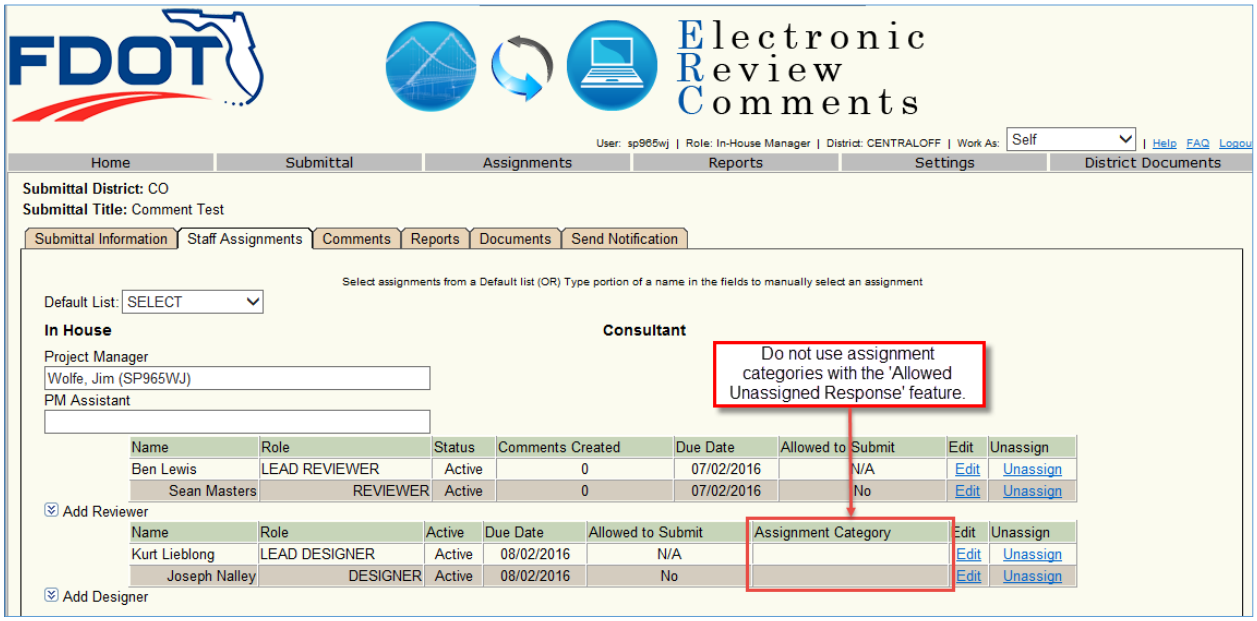
This will allow any designer assigned to a submittal the ability to respond to any comment that is assigned to the Consultant PM for consultant type submittals and the In-House PM for the in-house type submittals. Once the designer saves a response, the comment will be assigned to that designer. Using this feature, the designers will pick the comments to respond to without the PM assigning the comment or the comment being transferred by category.

The feature can be selected on the Submittal Information Screen. **District Administrators and In-House PM can select or unselect this feature.**

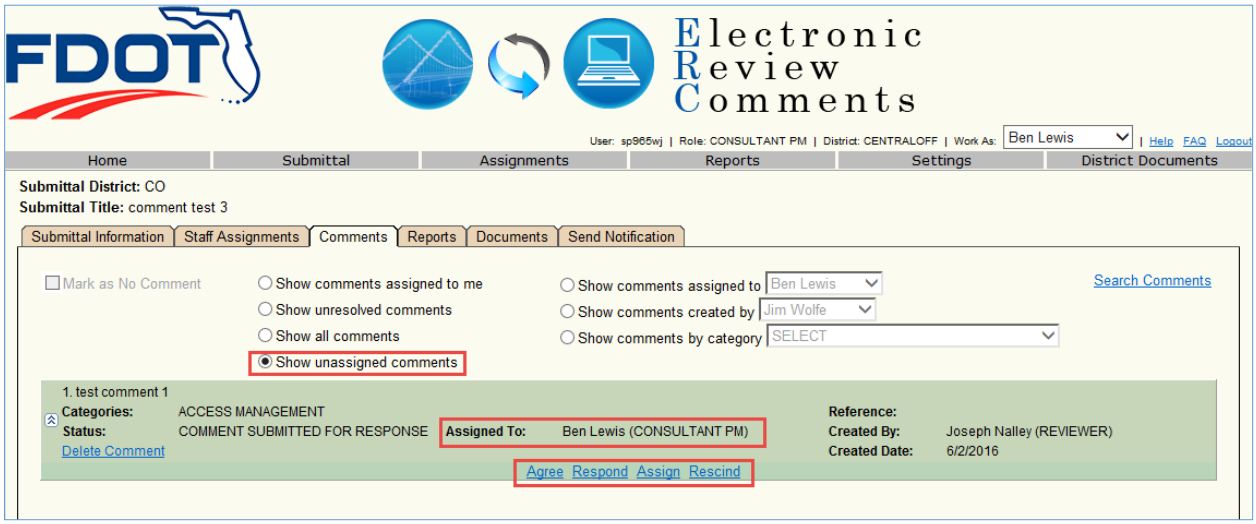


If this feature is going to be used for the majority of the Districts submittals, it can be set as a District Default Setting. For submittals that won't use the feature it can be overridden on the submittal information screen.

In order for the feature to work correctly the comments must be assigned to the PM, so the comment categories should not be used for designers.

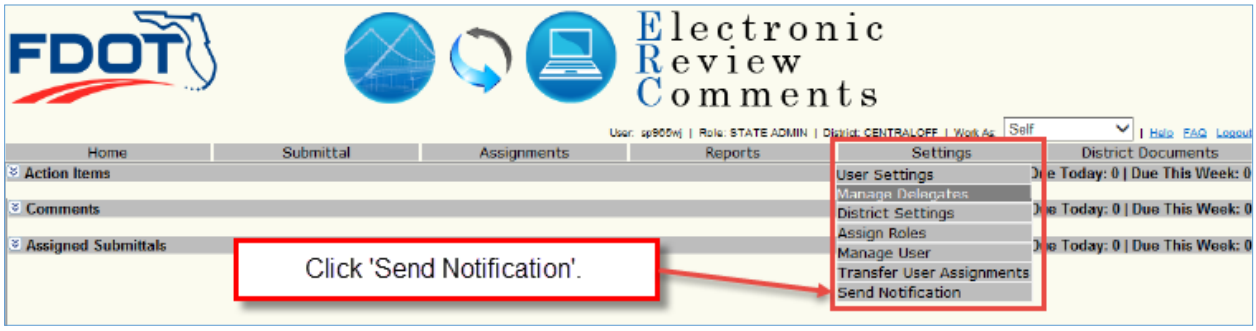


Once the submittal is set up and comments have been assigned to the Consultant PM for consultant type submittals or the In-House PM for in-house type submittals, the designers will have an option on the comments screen to '**Show Unassigned Comments**.' Once a designer saves a response the comment will then be assigned to them.

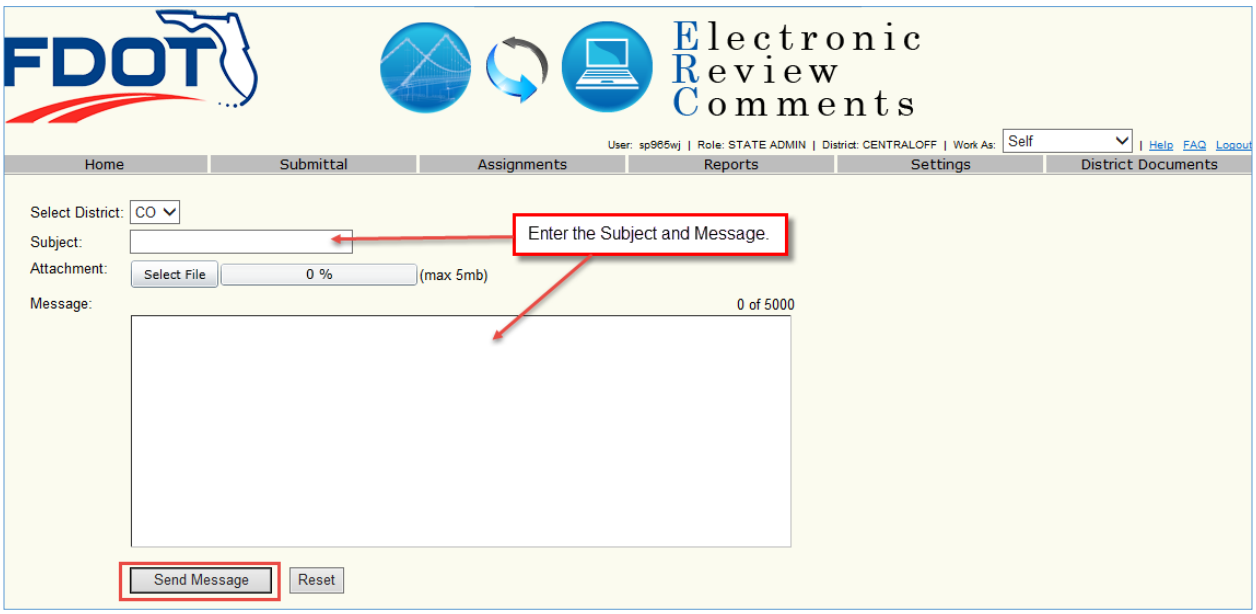


Send Notification

The District Administrator have the ability to send a broadcast e-mail message to active users on open submittals within their District. Select the '**Send Notification'** option under the Settings Menu.



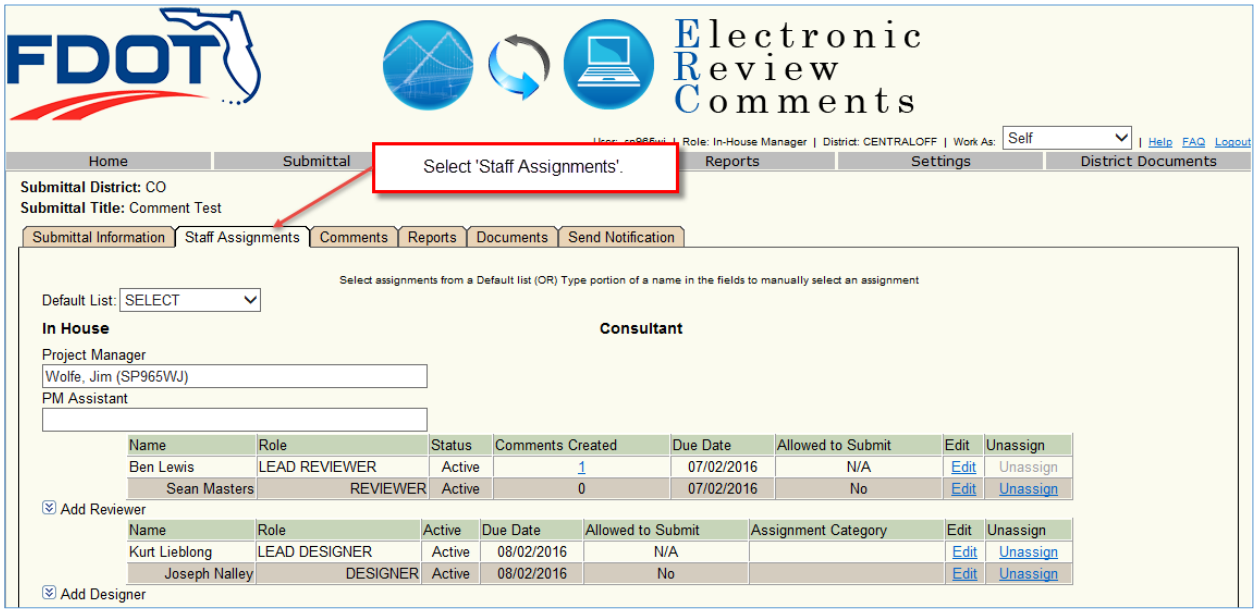
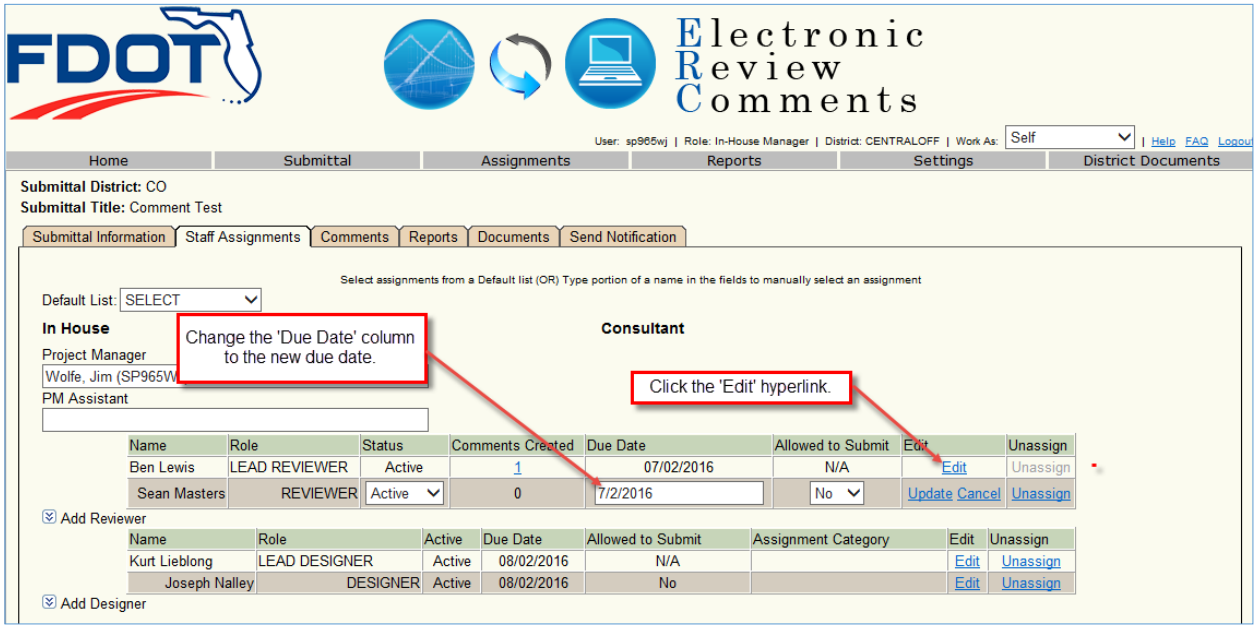
This will open the screen below. Enter the subject and message, attach a file if necessary and click the '**Send Message'** button.



Comment/Response Due Date Extension

If the comment/response due date has passed for a submittal and users still need to submit comments or responses users can request an extension from the In-House PM on the submittal or a District Administrator.

As an In-House PM or District Administrator open the '**Staff Assignments'** tab for the requested submittal.



Select the '**Edit**' hyperlink for the desired user. Change the '**Due Date'** column to the new comment/response due date for that user.