

Functional Area – Agreements

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

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

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

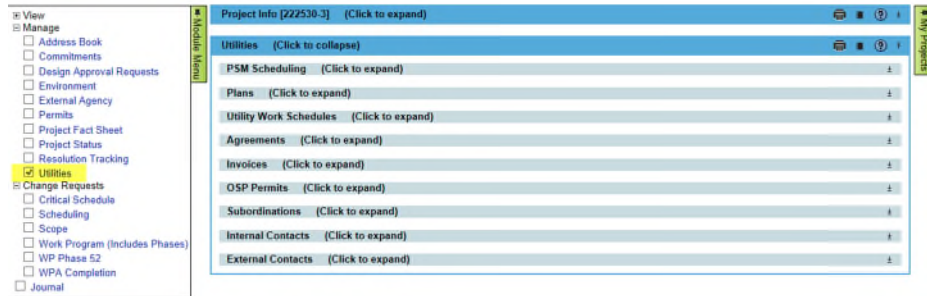
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Project Level

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

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



2. Click the Agreements bar to expand.


	Project Phase	Sequence	Agreement Action	Agreement Status	Contract #	Dr
View	Remove	50 - CONSTRUCTION OTHER AGENCY	1	AGREEMENT	AGREEMENT NOT ACCEPTED	C9019
View	Remove	32 - PRELIM ENGINEERING CONSULTANT	99	AGREEMENT	AGREEMENT NOT ACCEPTED	D9317
View	Remove	32 - PRELIM ENGINEERING CONSULTANT	10	AGREEMENT	FOR FOOT LEGAL SIGNATURE	C9019
View	Remove	52 - CONSTRUCTION CONSULT/CONTRACT	11	CHANGE ORDER MASTER AGREEMENT	AGREEMENT SUBMITTED	C9019
View	Remove	38 - PRELIM ENGINEERING OTHER AGCY	12	CHANGE ORDER MASTER AGREEMENT	AGREEMENT SUBMITTED	C9019
View	Remove	38 - PRELIM ENGINEERING OTHER AGCY	82	CHANGE ORDER UWA	FOR FOOT LEGAL SIGNATURE	1212
View	Remove	56 - CONSTRUCTION UTILITY	28	CHANGES TO FORMS DOCUMENT	INITIAL DRAFT UAO REVIEW	C9019
View	Remove	36 - PRELIM ENGINEERING UTILITY	12	AGREEMENT ADDENDUM	AGREEMENT SUBMITTED	1214
View	Remove	32 - PRELIM ENGINEERING CONSULTANT	01	AGREEMENT	AGREEMENT SUBMITTED	C9019
View	Remove	36 - PRELIM ENGINEERING UTILITY	23	CHANGE ORDER UWA	AGREEMENT SUBMITTED	123

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Create Agreements Entry

1. Click “Create Agreements Entry” link.

2. Complete the entry form.

 indicates the field entry is required for creation.

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

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

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

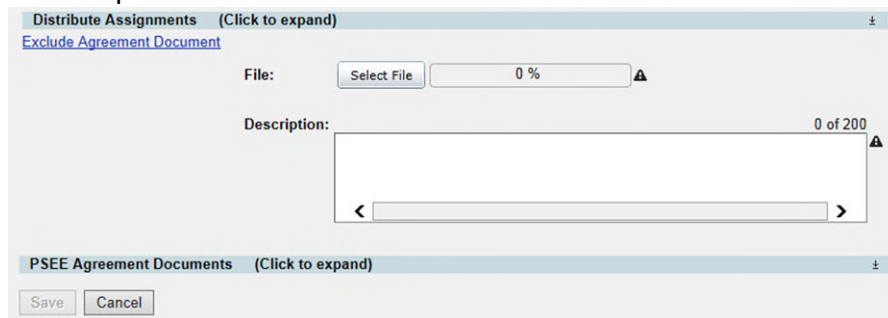
Utility Coordinator: The person responsible for coordinating with Utility Company.
 Operations Utility Coordinator: The FDOT construction contact for the project.

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

3. Click “Include Agreements Document” to upload related documents.

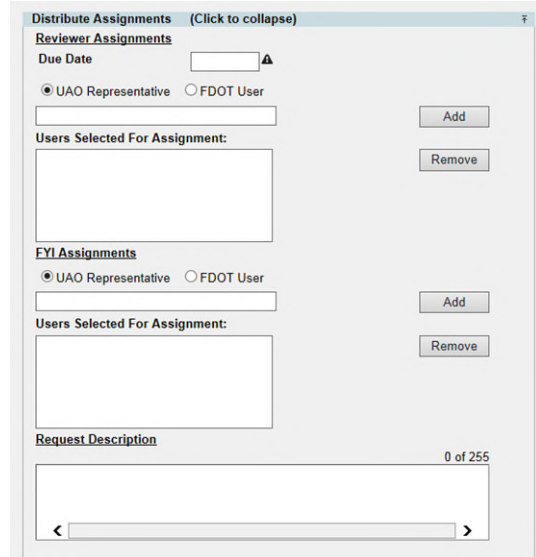


4. Click the “Select File” button to browse for your file. (Make sure the file is not currently open on your computer. This will cause an error when uploading.). In the description box, add an explanation of the document.



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

5. Click the “Distribute Assignments” bar to expand to add assignments. There are 2 types of assignments. **Reviewer Assignments** are users who are expected to review the entry and/or attached documents and provide a response. **FYI Assignments** are just to make a user aware of an entry but no response will be received.
6. Enter a Due Date. This is the date you expected all responses from Reviewers to be completed.

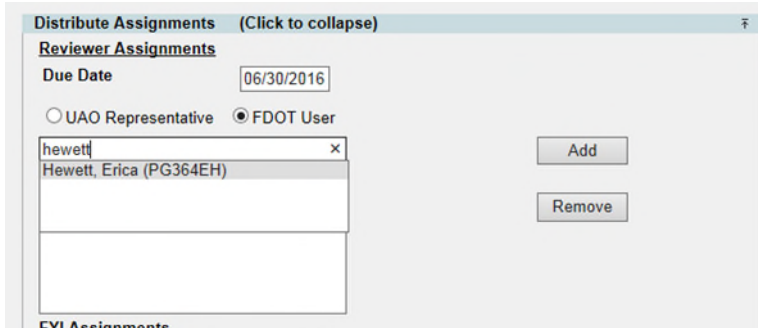


NOTE: This due date is part of the automated emails generated by ProjectSuite. Reviewers with an uncompleted assignment will receive an email: 1 week prior to due date, on the due date, and a weekly past due email.

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

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

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



8. Click Add. This will add the user to the box “Users Selected for Assignment”.
9. Repeat steps 7 & 8 until all reviewers have been added.
10. To remove a reviewer that was added in error, click the Remove button.
11. In the FYI assignments section, follow steps 7 – 10 to add as many FYI users as needed.

FYI Assignments

UAO Representative FDOT User

Add

Users Selected For Assignment:

Remove

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

Request Description 0 of 255

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13. Click Save.

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

Edit Agreements Entry

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

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

Project Phase	Sequence	Agreement Action	Agreement Status	Contract #	Original Contract Amount	Current Contract Amount
58 - CONSTRUCTION OTHER AGENCY	1	AGREEMENT	AGREEMENT NOT ACCEPTED	C9D19	\$ 4,123,308.00	\$ 4,123,307.00
32 - PRELIM ENGINEERING CONSULTANT	99	AGREEMENT	AGREEMENT NOT ACCEPTED	D9317		\$ 332,760.00
32 - PRELIM ENGINEERING CONSULTANT	10	AGREEMENT	FOR FDOT LEGAL SIGNATURE	C9D19	\$ 4,123,308.00	\$ 4,123,307.00
52 - CONSTRUCTION CONSULT/CONTRACT	11	CHANGE ORDER MASTER AGREEMENT	AGREEMENT SUBMITTED	C9D19	\$ 4,123,308.00	\$ 4,123,307.00
36 - PRELIM ENGINEERING OTHER AGCY	12	CHANGE ORDER MASTER AGREEMENT	AGREEMENT SUBMITTED	C9D19	\$ 4,123,308.00	\$ 4,123,307.00
38 - PRELIM ENGINEERING OTHER AGCY	82	CHANGE ORDER UWA	FOR FDOT LEGAL SIGNATURE	1212		
56 - CONSTRUCTION UTILITY	28	CHANGES TO FORMS DOCUMENT	INITIAL DRAFT UAO REVIEW	C9D19	\$ 4,123,308.00	\$ 4,123,307.00
36 - PRELIM ENGINEERING UTILITY	12	AGREEMENT ADDENDUM	AGREEMENT SUBMITTED	1234		
32 - PRELIM ENGINEERING CONSULTANT	01	AGREEMENT	AGREEMENT SUBMITTED	C9D19	\$ 4,123,308.00	\$ 4,123,307.00
36 - PRELIM ENGINEERING UTILITY	23	CHANGE ORDER UWA	AGREEMENT SUBMITTED	123		

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

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

Update Reviewer / FYI Assignments Status

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

Project Phase	Sequence	Agreement Action	Agreement Status	Contract #	Original Contract Amount	Current Contract Amount
View Remove 58 - CONSTRUCTION OTHER AGENCY	1	AGREEMENT	AGREEMENT NOT ACCEPTED	C9D19	\$ 4,123,308.00	\$ 4,123,307.00
View Remove 32 - PRELIM ENGINEERING CONSULTANT	99	AGREEMENT	AGREEMENT NOT ACCEPTED	D9317		\$ 332,790.00
View Remove 32 - PRELIM ENGINEERING CONSULTANT	10	AGREEMENT	FOR FDOT LEGAL SIGNATURE	C9D19	\$ 4,123,308.00	\$ 4,123,307.00
View Remove 52 - CONSTRUCTION CONSULT/CONTRACT	11	CHANGE ORDER MASTER AGREEMENT	AGREEMENT SUBMITTED	C9D19	\$ 4,123,308.00	\$ 4,123,307.00
View Remove 38 - PRELIM ENGINEERING OTHER AGCY	12	CHANGE ORDER MASTER AGREEMENT	AGREEMENT SUBMITTED	C9D19	\$ 4,123,308.00	\$ 4,123,307.00
View Remove 38 - PRELIM ENGINEERING OTHER AGCY	82	CHANGE ORDER UWA	FOR FDOT LEGAL SIGNATURE	1212		
View Remove 58 - CONSTRUCTION UTILITY	28	CHANGES TO FORMS DOCUMENT	INITIAL DRAFT UAO REVIEW	C9D19	\$ 4,123,308.00	\$ 4,123,307.00
View Remove 36 - PRELIM ENGINEERING UTILITY	12	AGREEMENT ADDENDUM	AGREEMENT SUBMITTED	1234		
View Remove 32 - PRELIM ENGINEERING CONSULTANT	01	AGREEMENT	AGREEMENT SUBMITTED	C9D19	\$ 4,123,308.00	\$ 4,123,307.00
View Remove 36 - PRELIM ENGINEERING UTILITY	23	CHANGE ORDER UWA	AGREEMENT SUBMITTED	123		

2. Click view next to the Assignment

Reviewer	Assignment Status	Due Date	Completed Date	Request Description
View Dairy Queen Tallahassee - Monroe - DUANE DAUNT	IN PROGRESS	6/30/2016		
View Dairy Queen Tallahassee - JEFF MOORE	IN PROGRESS	6/15/2016		

Reviewer	Assignment Status	Due Date	Completed Date
View Regina Battles	IN PROGRESS	6/30/2016	

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

From the dropdown, select the assignment status to update.

Edit Reviewer Assignment Entry

Project: 222530- 3
 Project Phase: 58 - CONSTRUCTION OTHER AGENCY
 Reviewer: Dustin Castells
 Due Date: 6/30/2016
 Assignment Status: **IN PROGRESS** (dropdown menu open)
 Assignment Type: Agreement
 Sequence: 1
 Request Description: Type instructions here.
[Include Agreement Document](#)

PSEE Agreement Documents (Click to expand)

Save Cancel

4. Click Save.

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

Add Comments to Agreements Entry

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

Project Phase	Sequence	Agreement Action	Agreement Status	Contract #	Original Contract Amount	Current Contract Amount
View Remove 58 - CONSTRUCTION OTHER AGENCY	1	AGREEMENT	AGREEMENT NOT ACCEPTED	C9D19	\$ 4,123,308.00	\$ 4,123,307.00
View Remove 32 - PRELIM ENGINEERING CONSULTANT	99	AGREEMENT	AGREEMENT NOT ACCEPTED	D9317		\$ 332,760.00
View Remove 32 - PRELIM ENGINEERING CONSULTANT	10	AGREEMENT	FOR FDOT LEGAL SIGNATURE	C9D19	\$ 4,123,308.00	\$ 4,123,307.00
View Remove 52 - CONSTRUCTION CONSULT/CONTRACT	11	CHANGE ORDER MASTER AGREEMENT	AGREEMENT SUBMITTED	C9D19	\$ 4,123,308.00	\$ 4,123,307.00
View Remove 36 - PRELIM ENGINEERING OTHER AGCY	12	CHANGE ORDER MASTER AGREEMENT	AGREEMENT SUBMITTED	C9D19	\$ 4,123,308.00	\$ 4,123,307.00
View Remove 38 - PRELIM ENGINEERING OTHER AGCY	82	CHANGE ORDER UWA	FOR FDOT LEGAL SIGNATURE	1212		
View Remove 56 - CONSTRUCTION UTILITY	28	CHANGES TO FORMS DOCUMENT	INITIAL DRAFT UAO REVIEW	C9D19	\$ 4,123,308.00	\$ 4,123,307.00
View Remove 36 - PRELIM ENGINEERING UTILITY	12	AGREEMENT ADDENDUM	AGREEMENT SUBMITTED	1234		
View Remove 32 - PRELIM ENGINEERING CONSULTANT	01	AGREEMENT	AGREEMENT SUBMITTED	C9D19	\$ 4,123,308.00	\$ 4,123,307.00
View Remove 36 - PRELIM ENGINEERING UTILITY	23	CHANGE ORDER UWA	AGREEMENT SUBMITTED	123		

2. Scroll to the Comments area and click Add Comment

Comments For Agreement 222530-3 (Click to collapse)

Kathy Ozmore @ 6/24/2016 4:13:25 PM:
Extra notes to remember.

[Add Comment](#)

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

Add Comment

Adding Comment To Agreement for 222530-3

0 of 255

Comment:

Save Cancel

NOTE: Comments CAN NOT be edited or removed.

Remove Agreements Entry

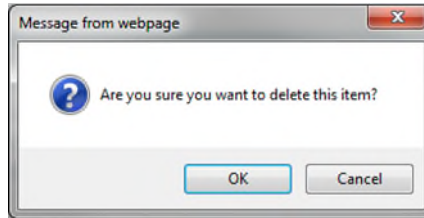
1. In the Agreements submodule of the Utility Module, locate the existing Entry needing to be removed.

Project Phase	Sequence	Agreement Action	Agreement Status	Contract #	Original Contract Amount	Current Contract Amount
View Remove 58 - CONSTRUCTION OTHER AGENCY	1	AGREEMENT	AGREEMENT NOT ACCEPTED	C9D19	\$ 4,123,308.00	\$ 4,123,307.00
View Remove 32 - PRELIM ENGINEERING CONSULTANT	99	AGREEMENT	AGREEMENT NOT ACCEPTED	D9317		\$ 332,760.00
View Remove 32 - PRELIM ENGINEERING CONSULTANT	10	AGREEMENT	FOR FDOT LEGAL SIGNATURE	C9D19	\$ 4,123,308.00	\$ 4,123,307.00
View Remove 52 - CONSTRUCTION CONSULT/CONTRACT	11	CHANGE ORDER MASTER AGREEMENT	AGREEMENT SUBMITTED	C9D19	\$ 4,123,308.00	\$ 4,123,307.00
View Remove 38 - PRELIM ENGINEERING OTHER AGCY	12	CHANGE ORDER MASTER AGREEMENT	AGREEMENT SUBMITTED	C9D19	\$ 4,123,308.00	\$ 4,123,307.00
View Remove 36 - PRELIM ENGINEERING OTHER AGCY	82	CHANGE ORDER UWA	FOR FDOT LEGAL SIGNATURE	1212		
View Remove 56 - CONSTRUCTION UTILITY	28	CHANGES TO FORMS DOCUMENT	INITIAL DRAFT UAO REVIEW	C9D19	\$ 4,123,308.00	\$ 4,123,307.00
View Remove 36 - PRELIM ENGINEERING UTILITY	12	AGREEMENT ADDENDUM	AGREEMENT SUBMITTED	1234		
View Remove 32 - PRELIM ENGINEERING CONSULTANT	01	AGREEMENT	AGREEMENT SUBMITTED	C9D19	\$ 4,123,308.00	\$ 4,123,307.00
View Remove 36 - PRELIM ENGINEERING UTILITY	23	CHANGE ORDER UWA	AGREEMENT SUBMITTED	123		

2. Click Remove.

[View](#) [Remove](#)

3. Confirm the removal.



NOTE: This action CAN NOT be undone.

Remove Assignments from existing Agreements Entry

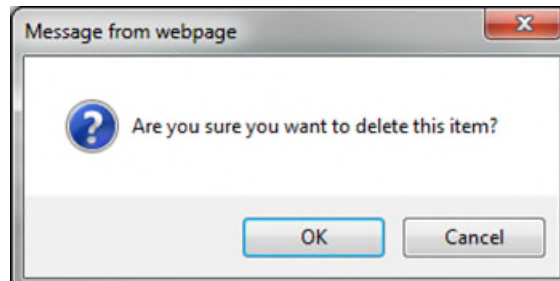
1. In the Agreements submodule of the Utility Module, Select “View” next to existing Entry needing assignments removed.

Project/Phase	Sequence	Agreement Action	Agreement Status	Contract #	Original Contract Amount	Current Contract Amount
58 - CONSTRUCTION OTHER AGENCY	1	AGREEMENT	AGREEMENT NOT ACCEPTED	C9D19	\$ 4,123,308.00	\$ 4,123,307.00
32 - PRELIM ENGINEERING CONSULTANT	99	AGREEMENT	AGREEMENT NOT ACCEPTED	D9317	\$ 332,760.00	\$ 332,760.00
32 - PRELIM ENGINEERING CONSULTANT	10	AGREEMENT	FOR FDOT LEGAL SIGNATURE	C9D19	\$ 4,123,308.00	\$ 4,123,307.00
52 - CONSTRUCTION CONSULT/CONTRACT	11	CHANGE ORDER MASTER AGREEMENT	AGREEMENT SUBMITTED	C9D19	\$ 4,123,308.00	\$ 4,123,307.00
38 - PRELIM ENGINEERING OTHER AGCY	12	CHANGE ORDER MASTER AGREEMENT	AGREEMENT SUBMITTED	C9D19	\$ 4,123,308.00	\$ 4,123,307.00
38 - PRELIM ENGINEERING OTHER AGCY	82	CHANGE ORDER UWIA	FOR FDOT LEGAL SIGNATURE	I212	\$ 4,123,308.00	\$ 4,123,307.00
56 - CONSTRUCTION UTILITY	28	CHANGES TO FORMS DOCUMENT	INITIAL DRAFT UAO REVIEW	C9D19	\$ 4,123,308.00	\$ 4,123,307.00
36 - PRELIM ENGINEERING UTILITY	12	AGREEMENT ADDENDUM	AGREEMENT SUBMITTED	1234	\$ 4,123,308.00	\$ 4,123,307.00
32 - PRELIM ENGINEERING CONSULTANT	01	AGREEMENT	AGREEMENT SUBMITTED	C9D19	\$ 4,123,308.00	\$ 4,123,307.00
36 - PRELIM ENGINEERING UTILITY	23	CHANGE ORDER UWIA	AGREEMENT SUBMITTED	123	\$ 4,123,308.00	\$ 4,123,307.00

2. Click Remove next the appropriate assignment.

Reviewer	Assignment Status	Due Date	Completed Date	Request Description
Carla Hodges	IN PROGRESS	6/30/2016		test
Dairy Queen Tallahassee - ANDY ROBERTS	IN PROGRESS	7/1/2017		
Dairy Queen Tallahassee - QUANE DAUNT	IN PROGRESS	7/1/2016		
Dairy Queen - WALTER BAGLEY	IN PROGRESS	6/14/2016		
AcroNot - JEFF MOORE	IN PROGRESS	6/13/2016		
AcroNot - JEFF MOORE	IN PROGRESS	6/7/2016		
Dairy Queen Tallahassee - Monroe - DUANE DAUNT	IN PROGRESS	6/30/2016		
Dairy Queen Tallahassee - JEFF MOORE	IN PROGRESS	6/15/2016		

3. Confirm the removal.



View Agreements Entry

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

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

	Project Phase	Sequence	Agreement Action	Agreement Status	Contract #	Original Contract Amount	Current Contract Amount
View Remove	58 - CONSTRUCTION OTHER AGENCY	1	AGREEMENT	AGREEMENT NOT ACCEPTED	C9D19	\$ 4,123,308.00	\$ 4,123,307.00
View Remove	32 - PRELIM ENGINEERING CONSULTANT	99	AGREEMENT	AGREEMENT NOT ACCEPTED	D9317	\$ 332,760.00	
View Remove	32 - PRELIM ENGINEERING CONSULTANT	10	AGREEMENT	FOR FDOT LEGAL SIGNATURE	C9D19	\$ 4,123,308.00	\$ 4,123,307.00
View Remove	52 - CONSTRUCTION CONSULT/CONTRACT	11	CHANGE ORDER MASTER AGREEMENT	AGREEMENT SUBMITTED	C9D19	\$ 4,123,308.00	\$ 4,123,307.00
View Remove	36 - PRELIM ENGINEERING OTHER AGCY	12	CHANGE ORDER MASTER AGREEMENT	AGREEMENT SUBMITTED	C9D19	\$ 4,123,308.00	\$ 4,123,307.00
View Remove	38 - PRELIM ENGINEERING OTHER AGCY	82	CHANGE ORDER UWA	FOR FDOT LEGAL SIGNATURE	I212		
View Remove	56 - CONSTRUCTION UTILITY	28	CHANGES TO FORMS DOCUMENT	INITIAL DRAFT UAO REVIEW	C9D19	\$ 4,123,308.00	\$ 4,123,307.00
View Remove	36 - PRELIM ENGINEERING UTILITY	12	AGREEMENT ADDENDUM	AGREEMENT SUBMITTED	1234		
View Remove	32 - PRELIM ENGINEERING CONSULTANT	01	AGREEMENT	AGREEMENT SUBMITTED	C9D19	\$ 4,123,308.00	\$ 4,123,307.00
View Remove	36 - PRELIM ENGINEERING UTILITY	23	CHANGE ORDER UWA	AGREEMENT SUBMITTED	123		

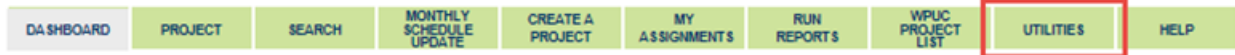
[\[Create Agreement Entry\]](#)
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2. Scroll through to see the entire Agreements Entry details in the functional areas.

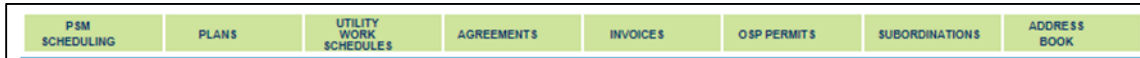
System Level

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

1. Select Utilities button from the system toolbar.




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



Create Agreements Entry

1. Click “Create Agreements Entry” link.

2. Complete the entry form.

 indicates the field entry is required for creation.

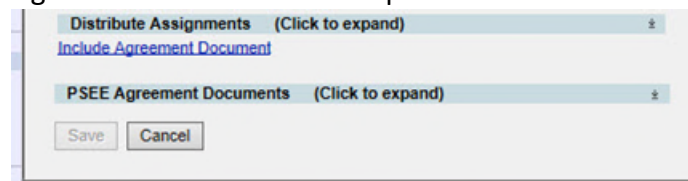
Project: The 7 digit Item/Item Segment the entry is for
 Project Phase: The 2 digit Funding Phase (ex. 52 – Construction)
 Sequence: The 2 digit Funding Sequence (ex. 01)

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

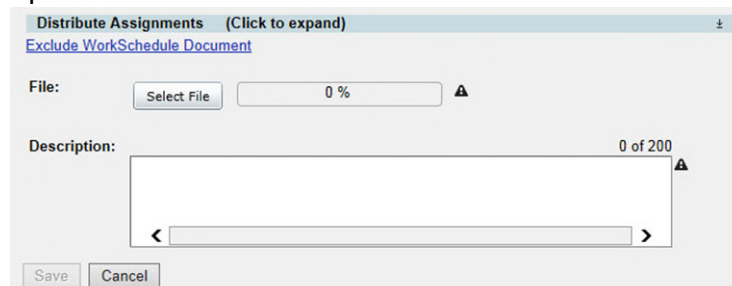
Agreements Action:	The action necessary at the time of the entry.
Agreements Status:	The status at the time of entry.
Contract #:	The number assigned to the agreement.
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Current Contract Amount:	Will populate based on the valid Contract # added.
Execution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

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

- Click “Include Agreements Document” to upload related documents.

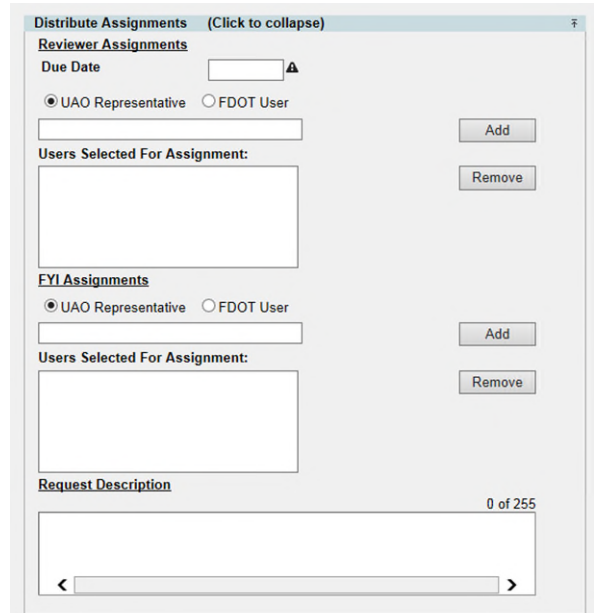


- Click the “Select File” button to browse for your file. (Make sure the file is not currently open on your computer. This will cause an error when uploading.). In the description box, add an explanation of the document.



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

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



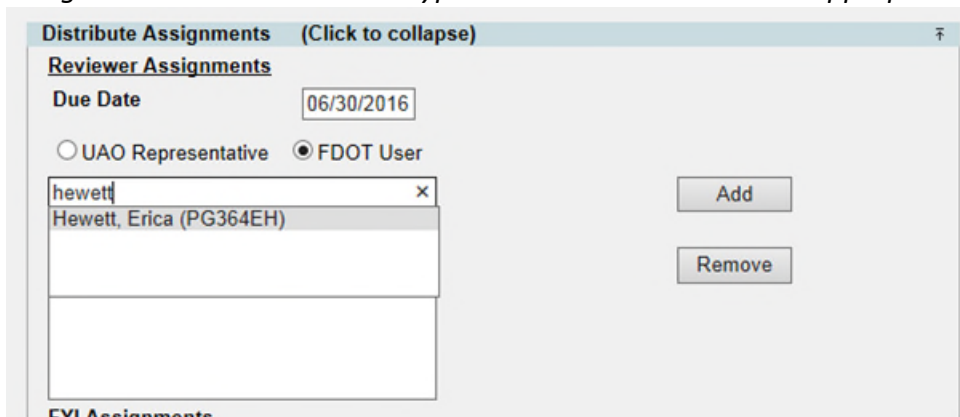
- Enter a Due Date. This is the date you expected all responses from Reviewers to be completed.

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

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

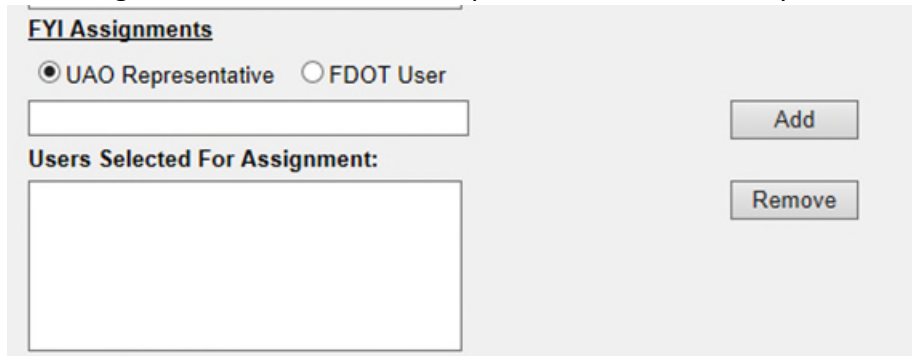
If adding a UAO Representative – in the box type the company they represent and then select the appropriate Representative. (ex. AT&T – John Doe)

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



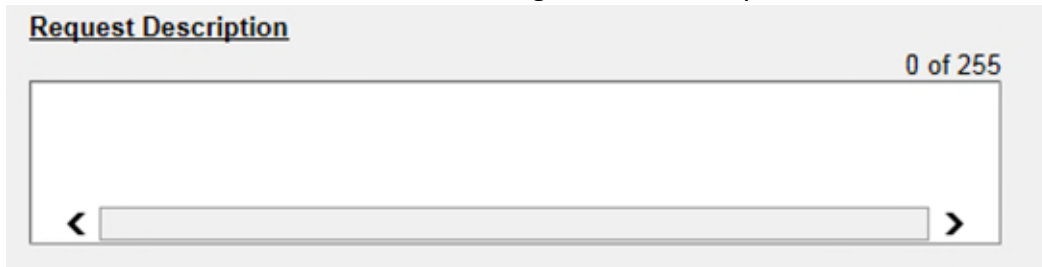
- Click Add. This will add the user to the box “Users Selected for Assignment”.
- Repeat steps 7 & 8 until all reviewers have been added.

10. To remove a reviewer that was added in error, click the Remove button.
11. In the FYI assignments section, follow steps 7 – 10 to add as many FYI users as needed.



The screenshot shows a section titled "FYI Assignments". At the top, there are two radio buttons: "UAO Representative" (which is selected) and "FDOT User". Below these is a text input field. To the right of the input field is an "Add" button. Below the input field is a section titled "Users Selected For Assignment:" followed by a larger empty rectangular box. To the right of this box is a "Remove" button.

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



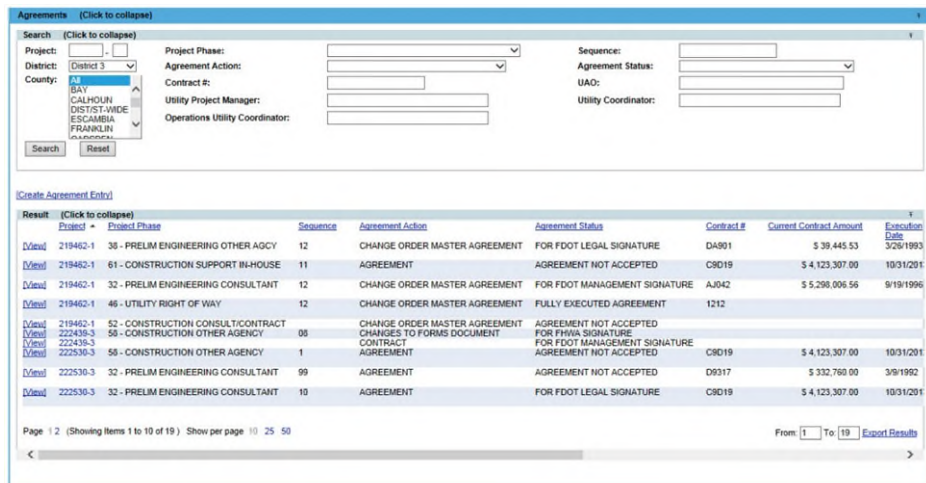
The screenshot shows a section titled "Request Description". In the top right corner of the section, it says "0 of 255". Below this is a large text area for entering the description. At the bottom of the text area, there is a horizontal scrollbar with left and right arrow buttons.

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

Edit Agreements Entry

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

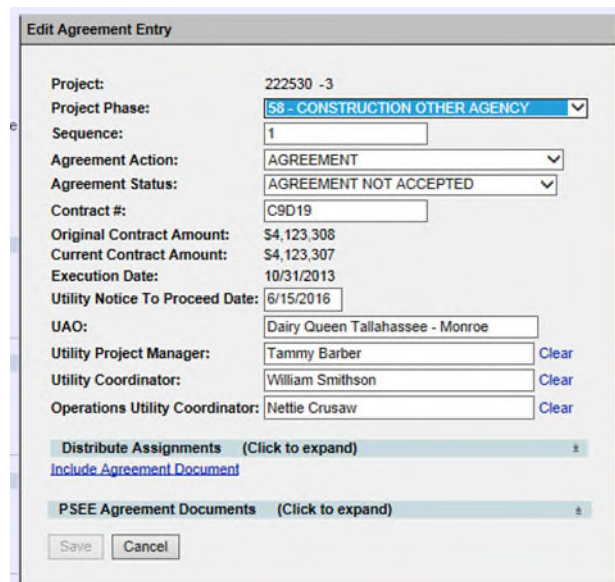
1. In the Results submodule of Agreements section, Select "View" next to existing Entry needing modifications.



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



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



Update Reviewer / FYI Assignments Status

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

Agreements (Click to collapse)

Search (Click to collapse)

Project: [] Project Phase: [] Sequence: []
 District: [District 3] Agreement Action: [] Agreement Status: []
 County: [BAY] Contract #: [] UAO: []
 Utility Project Manager: [] Operations Utility Coordinator: []

Search Reset

[Create Agreement Entry](#)

Result	Project	Project Phase	Sequence	Agreement Action	Agreement Status	Contract #	Current Contract Amount	Execution Date
View	219462-1	35 - PRELIM ENGINEERING OTHER AGCY	12	CHANGE ORDER MASTER AGREEMENT	FOR FDOT LEGAL SIGNATURE	DA801	\$ 39,445.53	3/26/1993
View	219462-1	61 - CONSTRUCTION SUPPORT IN-HOUSE	11	AGREEMENT	AGREEMENT NOT ACCEPTED	C8D19	\$ 4,123,307.00	10/31/201
View	219462-1	32 - PRELIM ENGINEERING CONSULTANT	12	CHANGE ORDER MASTER AGREEMENT	FOR FDOT MANAGEMENT SIGNATURE	AJ042	\$ 5,298,006.56	9/19/1996
View	219462-1	46 - UTILITY RIGHT OF WAY	12	CHANGE ORDER MASTER AGREEMENT	FULLY EXECUTED AGREEMENT	1212		
View	219462-1	52 - CONSTRUCTION CONSULT/CONTRACT	08	CHANGE ORDER MASTER AGREEMENT	AGREEMENT NOT ACCEPTED			
View	222438-3	58 - CONSTRUCTION OTHER AGENCY	11	CHANGES TO FORMS DOCUMENT	FOR FHWA SIGNATURE			
View	222438-3	58 - CONSTRUCTION OTHER AGENCY	1	CONTRACT AGREEMENT	FOR FDOT MANAGEMENT SIGNATURE			
View	222530-3	58 - CONSTRUCTION OTHER AGENCY	1	AGREEMENT	AGREEMENT NOT ACCEPTED	C8D19	\$ 4,123,307.00	10/31/201
View	222530-3	32 - PRELIM ENGINEERING CONSULTANT	99	AGREEMENT	AGREEMENT NOT ACCEPTED	D0317	\$ 332,760.00	3/9/1992
View	222530-3	32 - PRELIM ENGINEERING CONSULTANT	10	AGREEMENT	FOR FDOT LEGAL SIGNATURE	C8D19	\$ 4,123,307.00	10/31/201

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2. Click view next to the Assignment

Reviewer Assignments (Click to collapse)

Reviewer	Assignment Status	Due Date	Completed Date	Request Description
View Dairy Queen Tallahassee - Monroe - DUANE DAUNT	IN PROGRESS	6/30/2016		
View Dairy Queen Tallahassee - JEFF MOORE	IN PROGRESS	6/15/2016		

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FYI Assignments (Click to collapse)

Reviewer	Assignment Status	Due Date	Completed Date
View Regina Battles	IN PROGRESS	6/30/2016	

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

Edit Reviewer Assignment Entry

Project: 222530- 3
 Project Phase: 58 - CONSTRUCTION OTHER AGENCY
 Reviewer: Dustin Castells
 Due Date: 6/30/2016
 Assignment Status: **IN PROGRESS** [v]
 Assignment Type: Agreement
 Sequence: 1
 Request Description: Type instructions here.
[Include Agreement Document](#)

PSEE Agreement Documents (Click to expand)

Save Cancel

CANCELED
 COMPLETE
IN PROGRESS
 ISSUE CANCELED
 ISSUE COMPLETE

4. Click Save.

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

Add Comments to Agreements Entry

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

Result	Project Phase	Sequence	Agreement Action	Agreement Status	Contract #	Current Contract Amount	Execution Date
219462-1	36 - PRELIM ENGINEERING OTHER AGCY	12	CHANGE ORDER MASTER AGREEMENT	FOR FDOT LEGAL SIGNATURE	DA801	\$ 39,445.53	3/26/1993
219462-1	61 - CONSTRUCTION SUPPORT IN-HOUSE	11	AGREEMENT	AGREEMENT NOT ACCEPTED	C8D19	\$ 4,123,307.00	10/31/201
219462-1	32 - PRELIM ENGINEERING CONSULTANT	12	CHANGE ORDER MASTER AGREEMENT	FOR FDOT MANAGEMENT SIGNATURE	AJ042	\$ 5,298,006.56	9/19/1996
219462-1	46 - UTILITY RIGHT OF WAY	12	CHANGE ORDER MASTER AGREEMENT	FULLY EXECUTED AGREEMENT	1212		
219462-1	52 - CONSTRUCTION CONSULT/CONTRACT	08	CHANGE ORDER MASTER AGREEMENT	AGREEMENT NOT ACCEPTED			
222438-3	58 - CONSTRUCTION OTHER AGENCY	08	CHANGES TO FORMS DOCUMENT	FOR FHWA SIGNATURE			
222438-3	58 - CONSTRUCTION OTHER AGENCY	1	CONTRACT AGREEMENT	FOR FDOT MANAGEMENT SIGNATURE			
222530-3	58 - CONSTRUCTION OTHER AGENCY	1	AGREEMENT	AGREEMENT NOT ACCEPTED	C8D19	\$ 4,123,307.00	10/31/201
222530-3	32 - PRELIM ENGINEERING CONSULTANT	99	AGREEMENT	AGREEMENT NOT ACCEPTED	D0317	\$ 332,760.00	3/9/1992
222530-3	32 - PRELIM ENGINEERING CONSULTANT	10	AGREEMENT	FOR FDOT LEGAL SIGNATURE	C8D19	\$ 4,123,307.00	10/31/201

2. Scroll to the Comments area and click Add Comment

Comments For Agreement 222530-3 (Click to collapse)

Kathy Ozmore @ 6/24/2016 4:13:25 PM:
Extra notes to remember.

[Add Comment]

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

Add Comment

Adding Comment To Agreement for 222530-3

0 of 255

Comment:

Save Cancel

NOTE: Comments CAN NOT be edited or removed.

Remove Agreements Entry

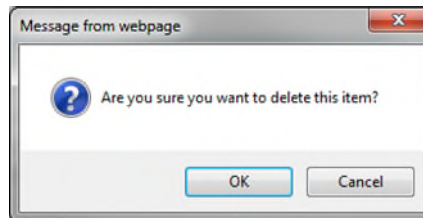
1. In the Agreements submodule of the Utility Module, locate the existing Entry needing to be removed.

	Project Phase	Sequence	Agreement Action	Agreement Status	Contract #	Original Contract Amount	Current Contract Amount
View [Remove]	58 - CONSTRUCTION OTHER AGENCY	1	AGREEMENT	AGREEMENT NOT ACCEPTED	CRD19	\$ 4,123,308.00	\$ 4,123,307.00
View [Remove]	32 - PRELIM ENGINEERING CONSULTANT	99	AGREEMENT	AGREEMENT NOT ACCEPTED	D9317		\$ 332,760.00
View [Remove]	32 - PRELIM ENGINEERING CONSULTANT	10	AGREEMENT	FOR FDOT LEGAL SIGNATURE	CRD19	\$ 4,123,308.00	\$ 4,123,307.00
View [Remove]	52 - CONSTRUCTION CONSULT/CONTRACT	11	CHANGE ORDER MASTER AGREEMENT	AGREEMENT SUBMITTED	CRD19	\$ 4,123,308.00	\$ 4,123,307.00
View [Remove]	38 - PRELIM ENGINEERING OTHER AGENCY	12	CHANGE ORDER MASTER AGREEMENT	AGREEMENT SUBMITTED	CRD19	\$ 4,123,308.00	\$ 4,123,307.00
View [Remove]	38 - PRELIM ENGINEERING OTHER AGENCY	82	CHANGE ORDER UWA	FOR FDOT LEGAL SIGNATURE	1212		
View [Remove]	56 - CONSTRUCTION UTILITY	26	CHANGES TO FORMS DOCUMENT	INITIAL DRAFT UAO REVIEW	CRD19	\$ 4,123,306.00	\$ 4,123,307.00
View [Remove]	36 - PRELIM ENGINEERING UTILITY	12	AGREEMENT ADDENDUM	AGREEMENT SUBMITTED	1234		
View [Remove]	32 - PRELIM ENGINEERING CONSULTANT	01	AGREEMENT	AGREEMENT SUBMITTED	CRD19	\$ 4,123,308.00	\$ 4,123,307.00
View [Remove]	36 - PRELIM ENGINEERING UTILITY	23	CHANGE ORDER UWA	AGREEMENT SUBMITTED	123		

2. Click Remove.



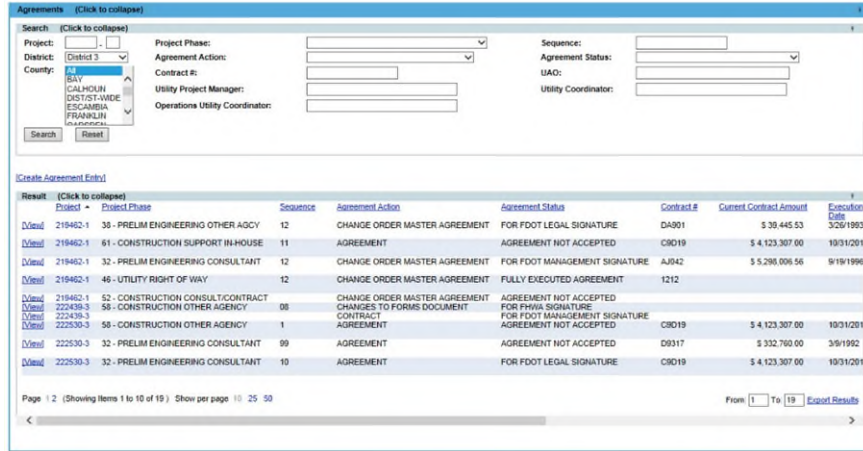
3. Confirm the removal.



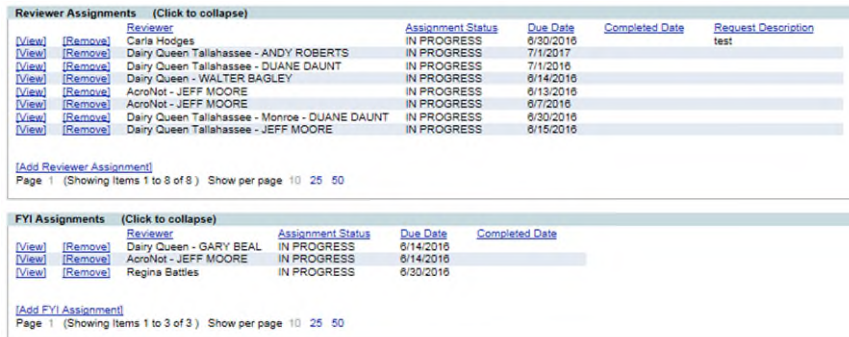
NOTE: This action CAN NOT be undone.

Remove Assignments from existing Agreements Entry

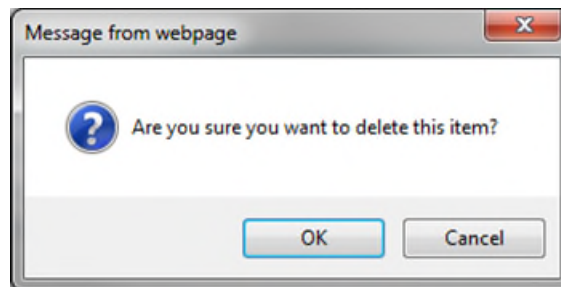
1. In the Results submodule of Agreements section, Select “View” next to existing Entry that need assignments removed.



2. Click Remove next the appropriate assignment.



3. Confirm the removal.

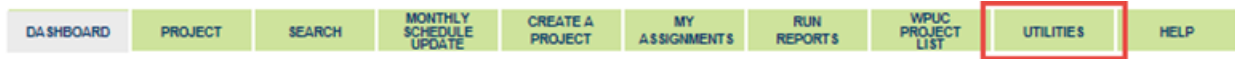


View Agreements Entry

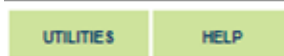
For internal and external users who do not have permissions to create, edit or remove.

1. Select Utilities button from the system toolbar.

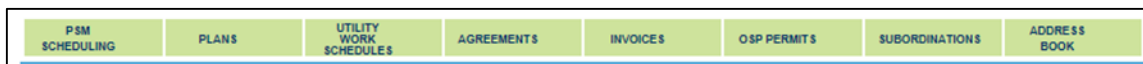
If the user is Internal the Utility button on the right side of the toolbar.



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



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



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

Agreements (Click to collapse)

Search (Click to collapse)

Project: [] District: [District 3] County: [BAY] Project Phase: [] Agreement Action: [] Contract #: [] Utility Project Manager: [] Operations Utility Coordinator: [] Sequence: [] Agreement Status: [] UAO: [] Utility Coordinator: []

[Search] [Reset]

[Create Agreement Entry]

Result	Project	Project Phase	Sequence	Agreement Action	Agreement Status	Contract #	Current Contract Amount	Execution Date
[View]	219462-1	36 - PRELIM ENGINEERING OTHER AGENCY	12	CHANGE ORDER MASTER AGREEMENT	FOR FDOT LEGAL SIGNATURE	DA901	\$ 39,445.53	3/26/1993
[View]	219462-1	61 - CONSTRUCTION SUPPORT IN-HOUSE	11	AGREEMENT	AGREEMENT NOT ACCEPTED	C9019	\$ 4,123,307.00	10/31/2011
[View]	219462-1	32 - PRELIM ENGINEERING CONSULTANT	12	CHANGE ORDER MASTER AGREEMENT	FOR FDOT MANAGEMENT SIGNATURE	AJ042	\$ 5,290,006.56	9/19/1996
[View]	219462-1	46 - UTILITY RIGHT OF WAY	12	CHANGE ORDER MASTER AGREEMENT	FULLY EXECUTED AGREEMENT	1212		
[View]	219462-1	52 - CONSTRUCTION CONSULT/CONTRACT		CHANGE ORDER MASTER AGREEMENT	AGREEMENT NOT ACCEPTED			
[View]	222439-3	58 - CONSTRUCTION OTHER AGENCY	08	CHANGES TO FORMS DOCUMENT	FOR FHWA SIGNATURE			
[View]	222439-3			CONTRACT	FOR FDOT MANAGEMENT SIGNATURE			
[View]	222530-3	58 - CONSTRUCTION OTHER AGENCY	1	AGREEMENT	AGREEMENT NOT ACCEPTED	C9019	\$ 4,123,307.00	10/31/2011
[View]	222530-3	32 - PRELIM ENGINEERING CONSULTANT	99	AGREEMENT	AGREEMENT NOT ACCEPTED	D9317	\$ 332,760.00	3/9/1992
[View]	222530-3	32 - PRELIM ENGINEERING CONSULTANT	10	AGREEMENT	FOR FDOT LEGAL SIGNATURE	C9019	\$ 4,123,307.00	10/31/2011

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