

Functional Area – Invoices

The Invoices functional area of the Utility Module allows a user to create assignments for both UAOs and FDOT staff to review Invoices. Once Invoices are ready for submittal, assignments can be created for the UAO and DUA/E. This includes returning invoices for corrections, and alerting a UAO that an invoice has been processed for payment. This also includes being able to route an invoice for review to multiple FDOT staff if applicable. UAOs will be able to respond to assignments by attaching a document. These assignments can be tracked by UAO until all responses are received.

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

The Invoices functional area is accessible two ways. The first is at a Project Level which allows the user to view the Invoices 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 Invoices functional area for multiple project at once.

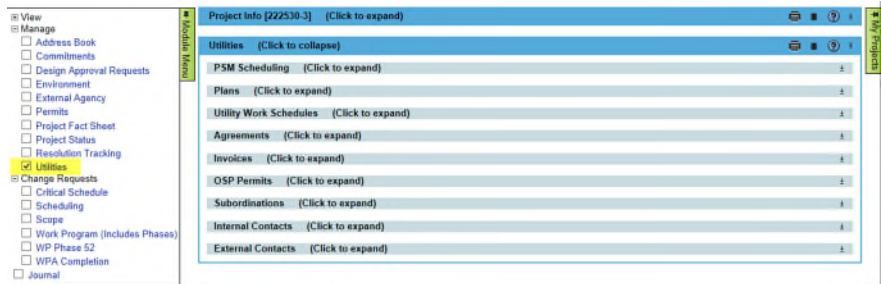
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Project Level Access

All Invoices 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



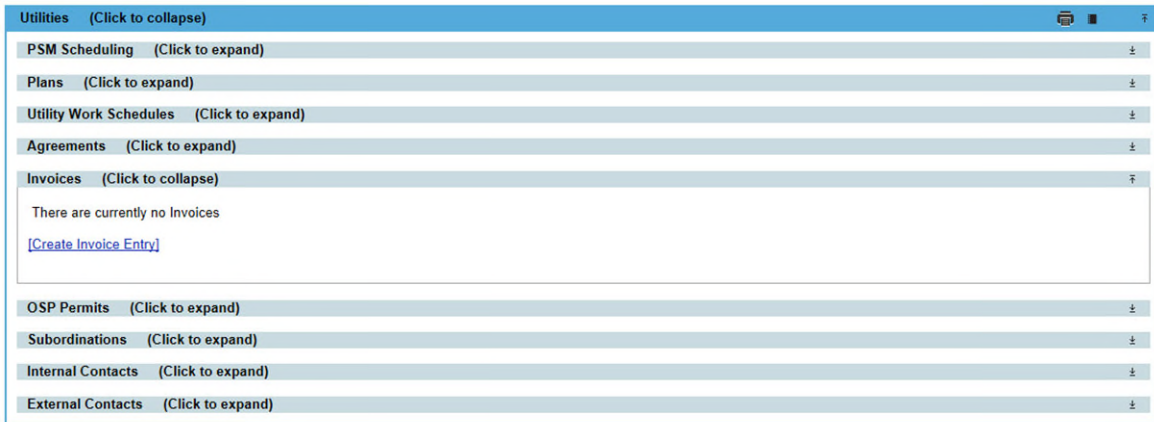
2. Click the Invoices bar to expand.

	Project Phase	Sequence	Contract #	Original Contract Amount	Current Contract Amount	Invoice #	Invoice Amount
View [Remove]	38 - PRELIM ENGINEERING OTHER AGCY	12	af345			212	\$ 12.00
View [Remove]	38 - PRELIM ENGINEERING UTILITY	12	C9D19	\$ 4,123,308.00	\$ 4,123,307.00	12	\$ 12.00
View [Remove]	38 - PRELIM ENGINEERING OTHER AGCY	83	1212			64	\$ 1,050.25
View [Remove]	58 - CONSTRUCTION OTHER AGENCY	23	C9D19	\$ 4,123,308.00	\$ 4,123,307.00	100	\$ 1,000.00
View [Remove]	38 - PRELIM ENGINEERING UTILITY	12	1234			1234	\$ 23,455.00
View [Remove]	32 - PRELIM ENGINEERING CONSULTANT	12	12345			1234a	\$ 1,234.00
View [Remove]	46 - UTILITY RIGHT OF WAY	98	C9D19	\$ 4,123,308.00	\$ 4,123,307.00		
View [Remove]	61 - CONSTRUCTION SUPPORT IN-HOUSE	57	C9D19	\$ 4,123,308.00	\$ 4,123,307.00	100	\$ 1,000.00
View [Remove]	62 - CONSTRUCTION SUPPORT CONSULT	96	C9D19	\$ 4,123,308.00	\$ 4,123,307.00		

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Create Invoices Entry

1. Click “Create Invoices Entry” link.



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

The screenshot shows the 'Add Invoice' form. It contains the following fields and options:

- Project: 218605 -3
- Project Phase: [Dropdown menu]
- Sequence: [Text input field with warning icon]
- Contract #: [Text input field with warning icon]
- Original Contract Amount:
- Current Contract Amount:
- Execution Date:
- Notice To Proceed Date:
- End Date:
- Invoice Date: [Text input field]
- Invoice #: [Text input field]
- Invoice Amount: [Text input field]
- Invoice Status: [Dropdown menu]
- Type: [Dropdown menu]
- Invoice Period From: [Text input field] To: [Text input field]
- Attested By: [Text input field] Clear
- UAO: [Text input field] ⚠
- Utility Project Manager: [Text input field] Clear
- Utility Coordinator: [Text input field] ⚠
- Operations Utility Coordinator: [Text input field] Clear

At the bottom of the form, there are two expandable sections: 'Distribute Assignments (Click to expand)' and 'PSEE Invoice Documents (Click to expand)'. Below these sections are 'Save' and 'Cancel' buttons.

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)

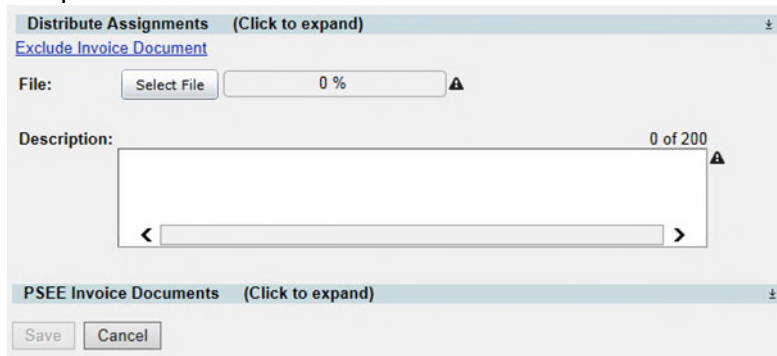
- Contract #: The number assigned to the agreement
- Original Contract Amount: Will populate based on the valid Contract # added
- Current Contract Amount: Will populate based on the valid Contract # added
- Execution Date: Will populate based on the valid Contract # added
- Notice to Proceed Date: The date time/billing can be applied to the contract
- End Date: The end date of the contract.
- Invoice #: The number assigned by the Utility Company
- Invoice Amount: The amount the Utility Company is billing the invoice for.
- Invoice Status: FDOT’s status of the review / processing of the invoice for payment.
- Type: Indicated if the invoice is for partial or final billing.
- Attested By: FDOT user who reviews and verifies the invoice
- UAO: The Utility Company for the Invoices
- 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 Invoices Document” to upload related documents.



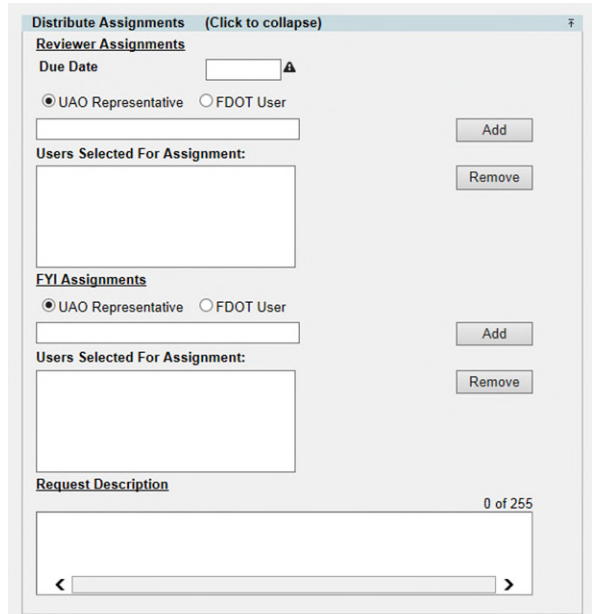
4. Click the “Select File” button to browse for your file. (Make sure the file is not currently open on your computer. This will cause an error when uploading.). In the description box, add an explanation of the document.



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.

- 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.



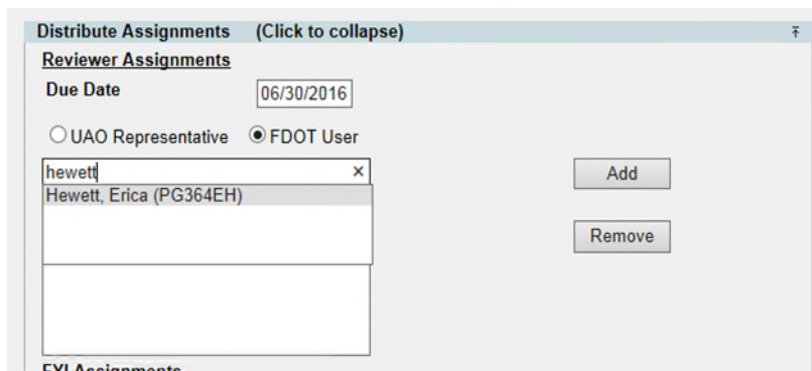
- Enter a Due Date. This is the date you expected all responses from Reviewers to be completed.

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.



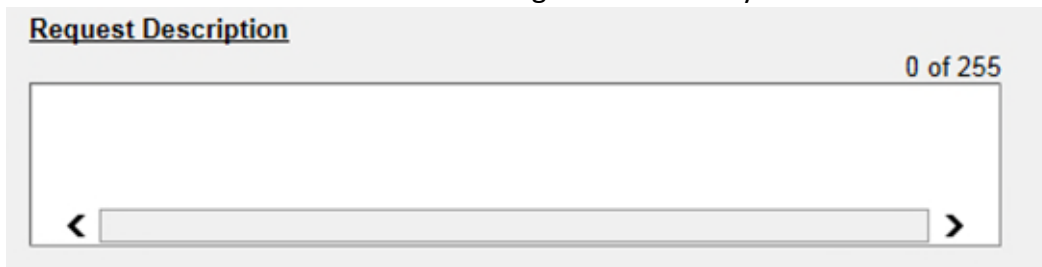
- Click Add. This will add the user to the box “Users Selected for Assignment”.
- Repeat steps 7 & 8 until all reviewers have been added.

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, it says "0 of 255". Below this is a large text area for entering a message. 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 Invoices Entry

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

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

	Project Phase	Sequence	Contract #	Original Contract Amount	Current Contract Amount	Invoice #	Invoice Amount	Invoice Status	Invoice Type	Invoice Date	Invoice Period From	Invoice Period To
View (Remove)	38 - PRELIM ENGINEERING OTHER AGCY	12	af345	\$ 4,123,308.00	\$ 4,123,307.00	212	\$ 12.00	APPROVED	PARTIAL	5/16/2016	5/9/2016	5/9/2016
View (Remove)	38 - PRELIM ENGINEERING UTILITY	12	C8D19	\$ 4,123,308.00	\$ 4,123,307.00	12	\$ 12.00	PENDING	PARTIAL	5/25/2016	5/16/2016	5/16/2016
View (Remove)	38 - PRELIM ENGINEERING OTHER AGCY	83	1212	\$ 4,123,308.00	\$ 4,123,307.00	64	\$ 1,050.25	PENDING	FINAL	6/28/2016	6/1/2016	6/1/2016
View (Remove)	58 - CONSTRUCTION OTHER AGENCY	23	C8D19	\$ 4,123,308.00	\$ 4,123,307.00	100	\$ 1,000.00	PENDING	PARTIAL	5/31/2016	4/4/2016	4/4/2016
View (Remove)	36 - PRELIM ENGINEERING UTILITY	12	1234	\$ 4,123,308.00	\$ 4,123,307.00	1234	\$ 23,455.00	PENDING	FINAL	6/13/2016	6/13/2016	6/13/2016
View (Remove)	32 - PRELIM ENGINEERING CONSULTANT	12	12345	\$ 4,123,308.00	\$ 4,123,307.00	1234a	\$ 1,234.00	PAID	FINAL	6/6/2016	6/6/2016	6/6/2016
View (Remove)	46 - UTILITY RIGHT OF WAY	86	C8D19	\$ 4,123,308.00	\$ 4,123,307.00			PENDING				
View (Remove)	61 - CONSTRUCTION SUPPORT IN-HOUSE	57	C8D19	\$ 4,123,308.00	\$ 4,123,307.00	100	\$ 1,000.00	PENDING	PARTIAL	6/30/2016	6/1/2016	6/1/2016
View (Remove)	62 - CONSTRUCTION SUPPORT CONSULT	96	C8D19	\$ 4,123,308.00	\$ 4,123,307.00			PENDING				

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

[Return to List](#) [\[Edit\]](#)

Project: 222530 -3

Project Phase: 38 - PRELIM ENGINEERING OTHER AGCY

Sequence: 12

Contract #: af345

Original Contract Amount:

Current Contract Amount:

Execution Date:

Notice To Proceed Date:

End Date:

Invoice Date: 5/16/2016

Invoice #: 212

Invoice Amount: 12

Invoice Status: APPROVED

Invoice Type: PARTIAL

Invoice Period From 5/9/2016 To: 5/23/2016

Attested By: Frederick Acosta

UAO: Dairy Queen

Utility Project Manager: Frederick Acosta

Utility Coordinator: Fedline Alceme

Operations Utility Coordinator: Fred Ackermann

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

Edit Invoice Entry

Project: 222530 -3

Project Phase: **38 - PRELIM ENGINEERING OTHER AGCY** (dropdown)

Sequence: 12

Contract #: af345

Original Contract Amount:

Current Contract Amount:

Execution Date:

Notice To Proceed Date:

End Date:

Invoice Date: 5/16/2016

Invoice #: 212

Invoice Amount: 12

Invoice Status: APPROVED (dropdown)

Type: PARTIAL (dropdown)

Invoice Period From: 5/9/2016 To: 5/23/2016

Attested By: Frederick Acosta [Clear](#)

UAO: Dairy Queen

Utility Project Manager: Frederick Acosta [Clear](#)

Utility Coordinator: Fedline Alceme

Operations Utility Coordinator: Fred Ackermann [Clear](#)

[Distribute Assignments](#) (Click to expand) ±

[Include Invoice Document](#)

[PSEE Invoice Documents](#) (Click to expand) ±

Update Reviewer / FYI Assignments Status

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

Agreements (Click to collapse)						
	Project Phase	Sequence	Agreement Action	Agreement Status	Contract #	Original Contract Amount
View	58 - CONSTRUCTION OTHER AGENCY	1	AGREEMENT	AGREEMENT NOT ACCEPTED	C9D19	\$ 4,123,307.00
View	32 - PRELIM ENGINEERING CONSULTANT	99	AGREEMENT	AGREEMENT NOT ACCEPTED	D9317	\$ 332,790.00
View	32 - PRELIM ENGINEERING CONSULTANT	10	AGREEMENT	FOR FDOT LEGAL SIGNATURE	C9D19	\$ 4,123,307.00
View	52 - CONSTRUCTION CONSULT/CONTRACT	11	CHANGE ORDER MASTER AGREEMENT	AGREEMENT SUBMITTED	C9D19	\$ 4,123,307.00
View	38 - PRELIM ENGINEERING OTHER AGCY	12	CHANGE ORDER MASTER AGREEMENT	AGREEMENT SUBMITTED	C9D19	\$ 4,123,307.00
View	38 - PRELIM ENGINEERING OTHER AGCY	82	CHANGE ORDER UWA	FOR FDOT LEGAL SIGNATURE	1212	
View	58 - CONSTRUCTION UTILITY	28	CHANGES TO FORMS DOCUMENT	INITIAL DRAFT UAO REVIEW	C9D19	\$ 4,123,307.00
View	36 - PRELIM ENGINEERING UTILITY	12	AGREEMENT ADDENDUM	AGREEMENT SUBMITTED	1224	
View	32 - PRELIM ENGINEERING CONSULTANT	01	AGREEMENT	AGREEMENT SUBMITTED	C9D19	\$ 4,123,307.00
View	36 - PRELIM ENGINEERING UTILITY	23	CHANGE ORDER UWA	AGREEMENT SUBMITTED	123	

2. Click view next to the Assignment

Reviewer Assignments (Click to collapse)				
	Reviewer	Assignment Status	Due Date	Completed Date
View	Dairy Queen Tallahassee - Monroe - DUANE DAUNT	IN PROGRESS	6/30/2016	
View	Dairy Queen Tallahassee - JEFF MOORE	IN PROGRESS	6/15/2016	

FYI Assignments (Click to collapse)				
	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** (selected)
 Assignment Type: Agreement
 Sequence: 1
 Request Description: Type instructions here.
[Include Agreement Document](#)

CANCELED
COMPLETE
IN PROGRESS
ISSUE CANCELED
ISSUE COMPLETE

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 Invoices Entry

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

	Project Phase	Sequence	Contract #	Original Contract Amount	Current Contract Amount	Invoice #	Invoice Amount	Invoice Status	Invoice Type	Invoice Date	Invoice Period
View	38 - PRELIM ENGINEERING OTHER AGCY	12	af345	\$ 4,123,308.00	\$ 4,123,307.00	212	\$ 12.00	APPROVED	PARTIAL	5/16/2016	5/9/2016
View	38 - PRELIM ENGINEERING UTILITY	12	C9D19	\$ 4,123,308.00	\$ 4,123,307.00	12	\$ 12.00	PENDING	PARTIAL	5/25/2016	5/16/2016
View	38 - PRELIM ENGINEERING OTHER AGCY	83	1212	\$ 4,123,308.00	\$ 4,123,307.00	64	\$ 1,050.25	PENDING	FINAL	6/28/2016	6/1/2016
View	58 - CONSTRUCTION OTHER AGENCY	23	C9D19	\$ 4,123,308.00	\$ 4,123,307.00	100	\$ 1,000.00	PENDING	PARTIAL	5/31/2016	4/4/2016
View	38 - PRELIM ENGINEERING UTILITY	12	1234	\$ 4,123,308.00	\$ 4,123,307.00	1234	\$ 23,455.00	PENDING	FINAL	6/13/2016	6/13/2016
View	32 - PRELIM ENGINEERING CONSULTANT	12	12345	\$ 4,123,308.00	\$ 4,123,307.00	1234a	\$ 1,234.00	PAID	FINAL	6/6/2016	6/6/2016
View	46 - UTILITY RIGHT OF WAY	96	C9D19	\$ 4,123,308.00	\$ 4,123,307.00			PENDING			
View	61 - CONSTRUCTION SUPPORT IN-HOUSE	57	C9D19	\$ 4,123,308.00	\$ 4,123,307.00	100	\$ 1,000.00	PENDING	PARTIAL	6/30/2016	6/1/2016
View	62 - CONSTRUCTION SUPPORT CONSULT	96	C9D19	\$ 4,123,308.00	\$ 4,123,307.00			PENDING			

2. Scroll to the Comments area and click Add Comment

Comments For Invoice 222530-3 (Click to collapse)

Kathy Ozmore @ 6/24/2016 4:55:03 PM:
Just a little reminder

[Add Comment](#)

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

Add Comment

Adding Comment To Invoice for 222530-3 0 of 255

Comment:

NOTE: Comments CAN NOT be edited or removed.

Remove Invoices Entry

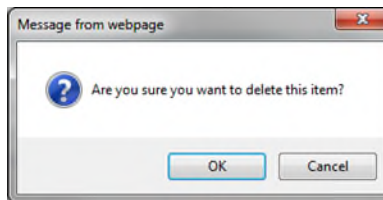
1. In the Invoices submodule of the Utility Module, locate the existing Entry needing to be removed.

	Project Phase	Sequence	Agreement Action	Agreement Status	Contract #	Original Contract Amount	Current Contract Amount
View	58 - CONSTRUCTION OTHER AGENCY	1	AGREEMENT	AGREEMENT NOT ACCEPTED	C9D19	\$ 4,123,308.00	\$ 4,123,307.00
View	32 - PRELIM ENGINEERING CONSULTANT	99	AGREEMENT	AGREEMENT NOT ACCEPTED	D817	\$ 333,788.00	
View	32 - PRELIM ENGINEERING CONSULTANT	10	AGREEMENT	FOR FDOT LEGAL SIGNATURE	C9D19	\$ 4,123,308.00	\$ 4,123,307.00
View	52 - CONSTRUCTION CONSULT/CONTRACT	11	CHANGE ORDER MASTER AGREEMENT	AGREEMENT SUBMITTED	C9D19	\$ 4,123,308.00	\$ 4,123,307.00
View	38 - PRELIM ENGINEERING OTHER AGCY	12	CHANGE ORDER MASTER AGREEMENT	AGREEMENT SUBMITTED	C9D19	\$ 4,123,308.00	\$ 4,123,307.00
View	38 - PRELIM ENGINEERING OTHER AGCY	82	CHANGE ORDER UWA	FOR FDOT LEGAL SIGNATURE	1212		
View	58 - CONSTRUCTION UTILITY	28	CHANGES TO FORMS DOCUMENT	INITIAL DRAFT UO REVIEW	C9D19	\$ 4,123,308.00	\$ 4,123,307.00
View	38 - PRELIM ENGINEERING UTILITY	12	AGREEMENT ADDENDUM	AGREEMENT SUBMITTED	1234		
View	32 - PRELIM ENGINEERING CONSULTANT	01	AGREEMENT	AGREEMENT SUBMITTED	C9D19	\$ 4,123,308.00	\$ 4,123,307.00
View	38 - 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 Invoices Entry

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

A screenshot of the "Invoices" table in the Utility Module. The table has columns for Project Phase, Sequence, Contract #, Original Contract Amount, Current Contract Amount, Invoice #, Invoice Amount, Invoice Status, Invoice Type, Invoice Date, and Invoice Period From. There are 9 rows of data, each with "View" and "Remove" links.

Project Phase	Sequence	Contract #	Original Contract Amount	Current Contract Amount	Invoice #	Invoice Amount	Invoice Status	Invoice Type	Invoice Date	Invoice Period From
38 - PRELIM ENGINEERING OTHER AGCY	12	af345			212	\$ 12.00	APPROVED	PARTIAL	5/16/2016	5/9/2016
38 - PRELIM ENGINEERING UTILITY	12	C9D19	\$ 4,123,308.00	\$ 4,123,307.00	12	\$ 12.00	PENDING	PARTIAL	5/25/2016	5/16/2016
38 - PRELIM ENGINEERING OTHER AGCY	33	1212			64	\$ 1,059.25	PENDING	FINAL	6/29/2016	6/1/2016
58 - CONSTRUCTION OTHER AGENCY	23	C9D19	\$ 4,123,308.00	\$ 4,123,307.00	100	\$ 1,000.00	PENDING	PARTIAL	5/13/2016	4/4/2016
38 - PRELIM ENGINEERING UTILITY	12	1234			1234	\$ 23,455.00	PENDING	FINAL	6/13/2016	6/13/2016
32 - PRELIM ENGINEERING CONSULTANT	12	12345			1234a	\$ 1,234.00	PAID	FINAL	6/6/2016	6/6/2016
46 - UTILITY RIGHT OF WAY	98	C9D19	\$ 4,123,308.00	\$ 4,123,307.00			PENDING			
61 - CONSTRUCTION SUPPORT IN-HOUSE	57	C9D19	\$ 4,123,308.00	\$ 4,123,307.00	100	\$ 1,000.00	PENDING	PARTIAL	6/30/2016	6/1/2016
62 - CONSTRUCTION SUPPORT CONSULT	96	C9D19	\$ 4,123,308.00	\$ 4,123,307.00			PENDING			

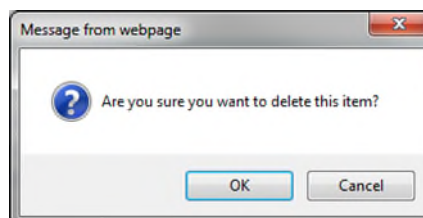
2. Click Remove next the appropriate assignment.

A screenshot showing two tables: "Reviewer Assignments" and "FYI Assignments". Both tables have columns for Reviewer, Assignment Status, Due Date, and Completed Date. Each row has "View" and "Remove" links.

Reviewer	Assignment Status	Due Date	Completed Date	Request Description
Carla Hodges	IN PROGRESS	6/30/2016		
Dairy Queen Tallahassee - ANDY ROBERTS	IN PROGRESS	7/1/2017		test
Dairy Queen Tallahassee - DUANE 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		

Reviewer	Assignment Status	Due Date	Completed Date
Dairy Queen - GARY BEAL	IN PROGRESS	6/14/2016	
AcroNot - JEFF MOORE	IN PROGRESS	6/14/2016	
Regina Battles	IN PROGRESS	6/30/2016	

3. Confirm the removal.



View Invoices Entry

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

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

Utilities (Click to collapse)								
PSM Scheduling (Click to expand)								
Plans (Click to expand)								
Utility Work Schedules (Click to expand)								
Agreements (Click to collapse)								
		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	I214		
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	I23		

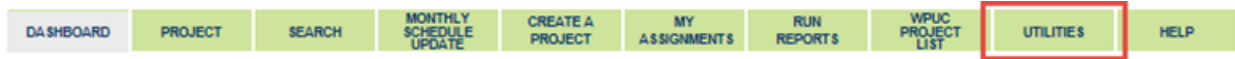
[\[Create Agreement Entry\]](#)
Page 12 (Showing Items 1 to 10 of 12) Show per page 10 25 50

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

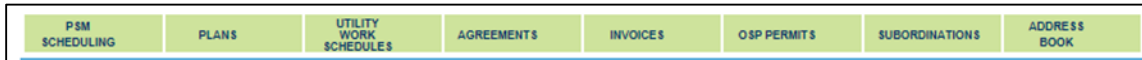
System Level Access

Invoices 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 Invoices button.



Create Invoices Entry

1. Click “Create Invoices Entry” link.

The screenshot shows the 'Invoices' form interface. At the top, there is a navigation bar with buttons for PSM SCHEDULING, PLANS, UTILITY WORK SCHEDULES, AGREEMENTS, INVOICES (selected), OSP PERMITS, SUBORDINATIONS, and ADDRESS BOOK. Below this is a search section with a 'Search (Click to collapse)' button and a 'Reset' button. The search criteria include Project (text input), District (dropdown menu showing 'District 3'), and County (dropdown menu showing 'AL', 'BAY', 'CALHOUN', 'DIST/ST-WIDE', 'ESCAMBIA', 'FRANKLIN', 'GADSDEN'). To the right of the search criteria are fields for Project Phase (dropdown), Contract # (text input), Invoice Status (dropdown), UAO (text input), Sequence (text input), Invoice # (text input), and Invoice Date (From: text input, To: text input). At the bottom left of the form, there is a link labeled 'Create Invoice Entry'.

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)

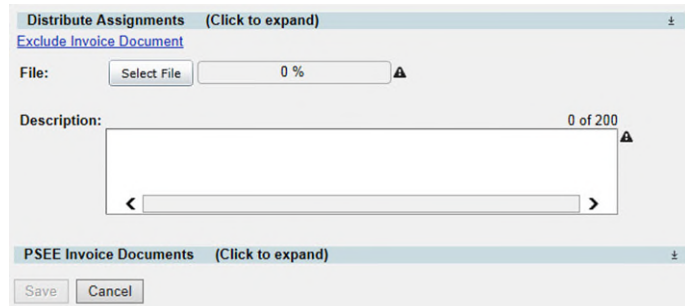
Contract #: The number assigned to the agreement
 Original Contract Amount: Will populate based on the valid Contract # added
 Current Contract Amount: Will populate based on the valid Contract # added
 Execution Date: Will populate based on the valid Contract # added
 Notice to Proceed Date: The date time/billing can be applied to the contract
 End Date: The end date of the contract.
 Invoice #: The number assigned by the Utility Company
 Invoice Amount: The amount the Utility Company is billing the invoice for.
 Invoice Status: FDOT’s status of the review / processing of the invoice for payment.
 Type: Indicated if the invoice is for partial or final billing.
 Attested By: FDOT user who reviews and verifies the invoice
 UAO: The Utility Company for the Invoices
 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 Invoices Document” to upload related documents.



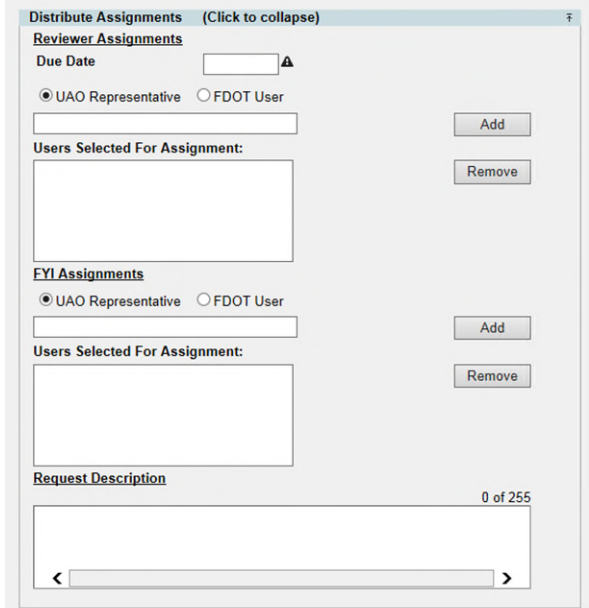
4. Click the “Select File” button to browse for your file. (Make sure the file is not currently open on your computer. This will cause an error when uploading.). In the description box, add an explanation of the document.



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.

- 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.



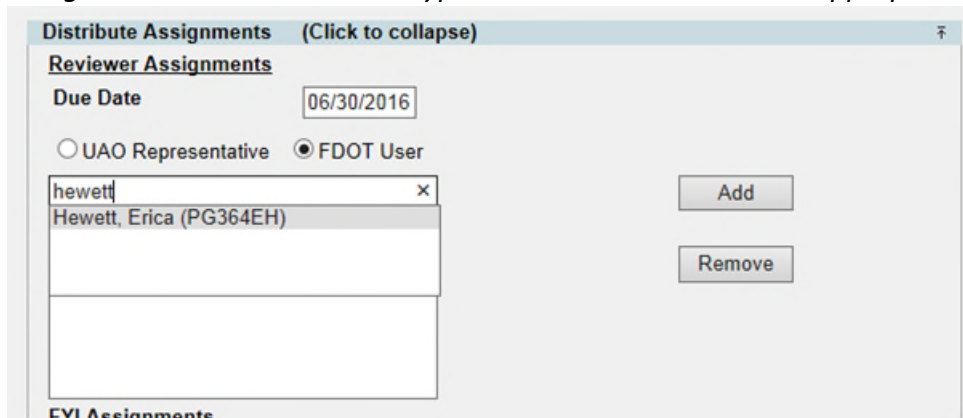
- Enter a Due Date. This is the date you expected all responses from Reviewers to be completed.

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.



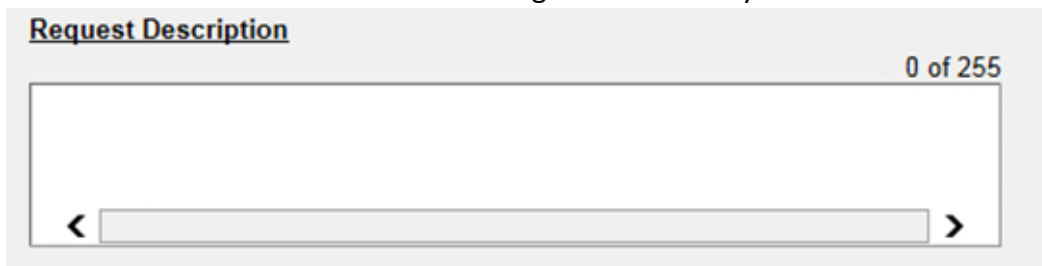
- Click Add. This will add the user to the box “Users Selected for Assignment”.

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.



The screenshot shows a section titled "FYI Assignments". It contains two radio buttons: "UAO Representative" (which is selected) and "FDOT User". Below the radio buttons is a text input field. To the right of this field is an "Add" button. Below the text field is a section labeled "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.



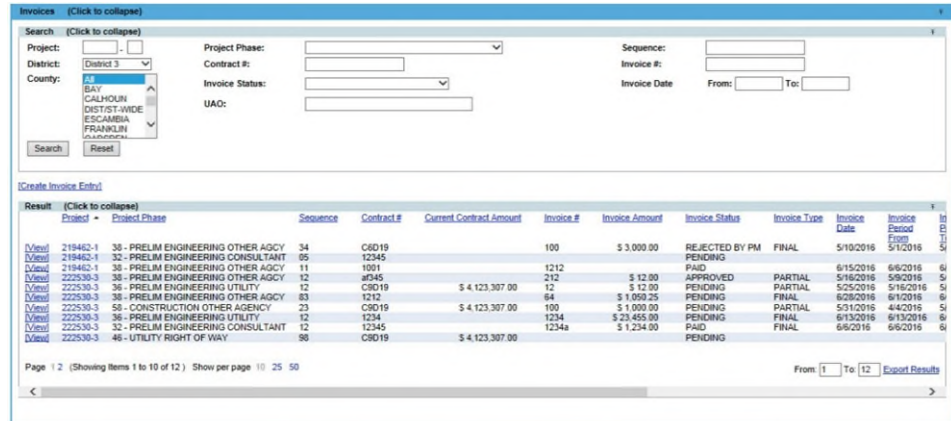
The screenshot shows a section titled "Request Description". In the top right corner of the section, it says "0 of 255". Below this is a large text area for entering the description. At the bottom of the text area, there is a horizontal scrollbar with left and right arrow buttons.

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

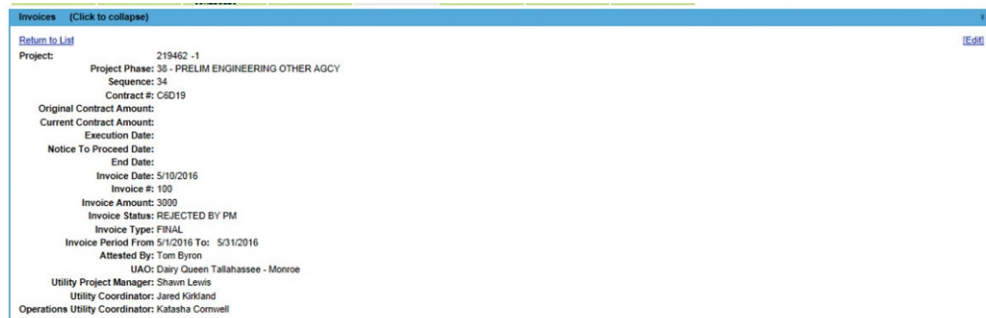
Edit Invoices Entry

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

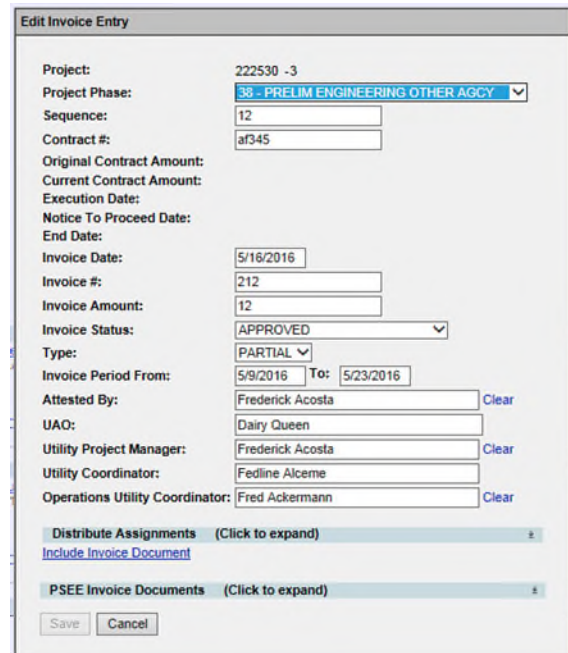
1. In the Results submodule of Invoices section, Select "View" next to existing Entry needing modifications.



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

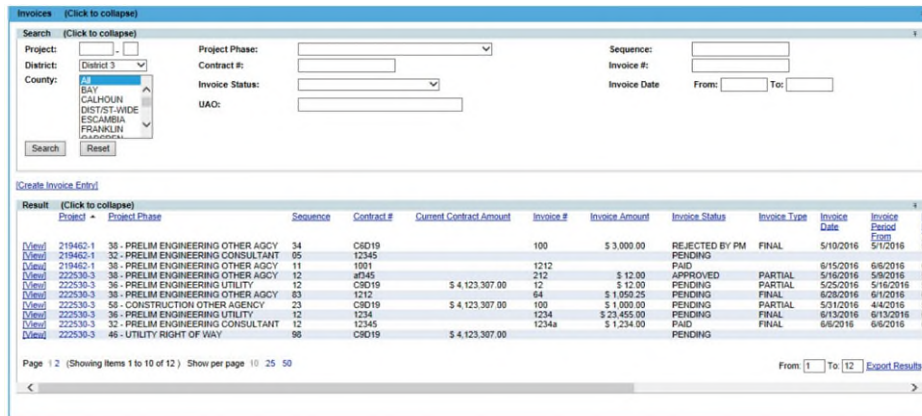


3. The Edit Invoices Entry box will open. Modify the areas necessary. Refer to the Create Invoices Entry for detailed instructions on adding Assignments and Documents.
4. When all changes have been made, click save.
5. Email notifications will be sent to new assignments that were made and to any user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



Update Reviewer / FYI Assignments Status

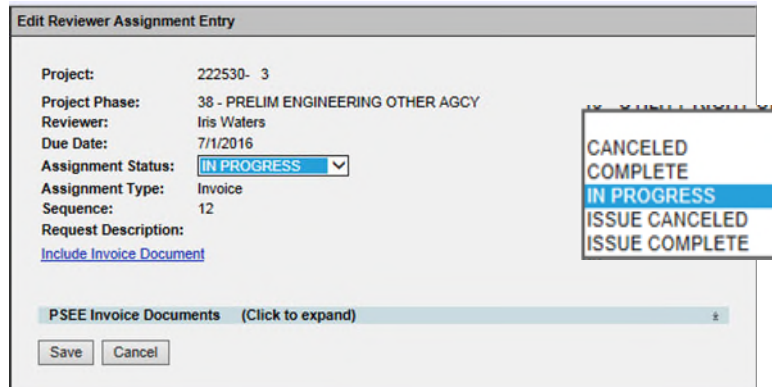
1. In the Results submodule of Invoices section, Select “View” next to existing Entry needing modifications.



2. Click view next to the Assignment



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



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

Add Comments to Invoices Entry

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

Project	Project Phase	Sequence	Contract #	Current Contract Amount	Invoice #	Invoice Amount	Invoice Status	Invoice Type	Invoice Date	Invoice Period
View	219462-1	35 - PRELIM ENGINEERING OTHER AGENCY	34	08019	100	\$ 3,000.00	REJECTED BY PM	FINAL	5/10/2016	6/6/2016
View	219462-1	32 - PRELIM ENGINEERING CONSULTANT	05	12345			PENDING			
View	219462-1	35 - PRELIM ENGINEERING OTHER AGENCY	11	1001			PAID			
View	222530-3	38 - PRELIM ENGINEERING OTHER AGENCY	12	0845	212	\$ 12.00	APPROVED	PARTIAL	5/16/2016	5/9/2016
View	222530-3	36 - PRELIM ENGINEERING UTILITY	12	08019	12	\$ 12.99	PENDING	PARTIAL	5/25/2016	5/16/2016
View	222530-3	38 - PRELIM ENGINEERING OTHER AGENCY	83	1212	64	\$ 1,050.25	PENDING	FINAL	6/28/2016	6/1/2016
View	222530-3	58 - CONSTRUCTION OTHER AGENCY	23	08019	100	\$ 1,000.00	PENDING	PARTIAL	5/31/2016	4/4/2016
View	222530-3	36 - PRELIM ENGINEERING UTILITY	12	1234	1234	\$ 21,450.00	PENDING	FINAL	6/13/2016	6/13/2016
View	222530-3	32 - PRELIM ENGINEERING CONSULTANT	12	12345	12344	\$ 1,234.00	PAID	FINAL	6/6/2016	6/6/2016
View	222530-3	46 - UTILITY RIGHT OF WAY	98	08019		\$ 4,123,307.00	PENDING			

2. Scroll to the Comments area and click Add Comment

Comments For Invoice 219462-1 (Click to collapse)

Duane Daunt @ 6/20/2016 11:28:57 AM:
in

[Add Comment](#)

Page 1 (Showing Items 1 to 1 of 1) Show per page 10 25 50

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

NOTE: Comments CAN NOT be edited or removed.

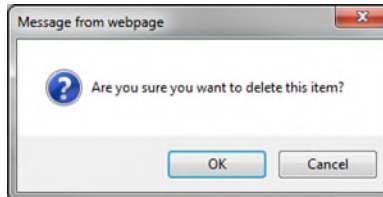
Remove Invoices Entry

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

The screenshot shows the 'Invoices' application window. At the top, there is a search filter with fields for Project, District (set to 'District 3'), County (set to 'All'), Project Phase, Contract #, Invoice Status, UAO, Sequence, Invoice #, and Invoice Date. Below the search filter is a table of invoice entries. The table has columns for Project, Project Phase, Sequence, Contract #, Current Contract Amount, Invoice #, Invoice Amount, Invoice Status, Invoice Type, Invoice Date, Invoice Period, and In. One entry is highlighted, and a blue 'View' link is visible next to it.

Project	Project Phase	Sequence	Contract #	Current Contract Amount	Invoice #	Invoice Amount	Invoice Status	Invoice Type	Invoice Date	Invoice Period	In
219462-1	38 - PRELIM ENGINEERING OTHER AGCY	34	C6D19		100	\$ 3,000.00	REJECTED BY PM	FINAL	5/10/2016	5/1/2016	5i
219462-1	32 - PRELIM ENGINEERING CONSULTANT	05	12345		1212		PENDING				5i
219462-1	38 - PRELIM ENGINEERING OTHER AGCY	11	1001				PAID		6/15/2016	6/6/2016	6i
222530-3	38 - PRELIM ENGINEERING OTHER AGCY	12	a9345		212	\$ 12.00	APPROVED	PARTIAL	5/16/2016	5/9/2016	5i
222530-3	36 - PRELIM ENGINEERING UTILITY	12	C9D19	\$ 4,123,307.00	12	\$ 12.00	PENDING	PARTIAL	5/25/2016	5/16/2016	5i
222530-3	38 - PRELIM ENGINEERING OTHER AGCY	83	1212		64	\$ 1,050.25	PENDING	FINAL	6/26/2016	6/1/2016	6i
222530-3	58 - CONSTRUCTION OTHER AGENCY	23	C9D19	\$ 4,123,307.00	100	\$ 1,000.00	PENDING	PARTIAL	5/31/2016	4/4/2016	5i
222530-3	36 - PRELIM ENGINEERING UTILITY	12	1234		1234	\$ 23,455.00	PENDING	FINAL	6/13/2016	6/13/2016	6i
222530-3	32 - PRELIM ENGINEERING CONSULTANT	12	12345		1234a	\$ 1,234.00	PAID	FINAL	6/6/2016	6/6/2016	6i
222530-3	46 - UTILITY RIGHT OF WAY	98	C9D19	\$ 4,123,307.00			PENDING				5i

2. Click Remove.
3. Confirm the removal.



NOTE: This action CAN NOT be undone.

Remove Assignments from existing Invoices Entry

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

Invoices (Click to collapse)

Search (Click to collapse)

Project: District: County: Project Phase: Contract #: Invoice Status: UAO: Sequence: Invoice #: Invoice Date: From: To:

[Create Invoice Entry]

Result	Project	Project Phase	Sequence	Contract #	Current Contract Amount	Invoice #	Invoice Amount	Invoice Status	Invoice Type	Invoice Date	Invoice Period
[View]	219462-1	38 - PRELIM ENGINEERING OTHER AGCY	34	C6D19		100	\$ 3,000.00	REJECTED BY PM	FINAL	5/10/2016	5/1/2016
[View]	219462-1	32 - PRELIM ENGINEERING CONSULTANT	05	12345				PENDING			
[View]	219462-1	38 - PRELIM ENGINEERING OTHER AGCY	11	1001		1212		PAID		6/15/2016	6/6/2016
[View]	222530-3	38 - PRELIM ENGINEERING OTHER AGCY	12	af345		212	\$ 12.00	APPROVED	PARTIAL	5/16/2016	5/9/2016
[View]	222530-3	36 - PRELIM ENGINEERING UTILITY	12	C9D19	\$ 4,123,307.00	12	\$ 12.00	PENDING	PARTIAL	5/25/2016	5/16/2016
[View]	222530-3	38 - PRELIM ENGINEERING OTHER AGCY	63	1212		64	\$ 1,050.25	PENDING	FINAL	6/23/2016	6/1/2016
[View]	222530-3	58 - CONSTRUCTION OTHER AGENCY	23	C9D19	\$ 4,123,307.00	100	\$ 1,000.00	PENDING	PARTIAL	5/31/2016	4/4/2016
[View]	222530-3	36 - PRELIM ENGINEERING UTILITY	12	1234		1234	\$ 23,455.00	PENDING	FINAL	6/13/2016	6/13/2016
[View]	222530-3	32 - PRELIM ENGINEERING CONSULTANT	12	12345		1234a	\$ 1,234.00	PAID	FINAL	6/6/2016	6/6/2016
[View]	222530-3	46 - UTILITY RIGHT OF WAY	98	C9D19	\$ 4,123,307.00			PENDING			

Page 1 2 (Showing Items 1 to 10 of 12) Show per page 10 25 50 From: 1 To: 12 Export Results

2. Click Remove next the appropriate assignment.

Reviewer Assignments (Click to collapse)

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

[Add Reviewer Assignment]

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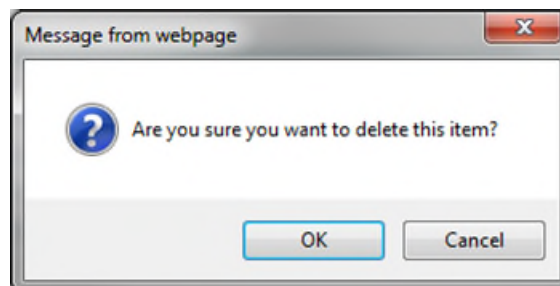
FYI Assignments (Click to collapse)

Reviewer	Assignment Status	Due Date	Completed Date
[View] [Remove] Dairy Queen - GARY BEAL	IN PROGRESS	6/14/2016	
[View] [Remove] AcroNot - JEFF MOORE	IN PROGRESS	6/14/2016	
[View] [Remove] Regina Battles	IN PROGRESS	6/30/2016	

[Add FYI Assignment]

Page 1 (Showing Items 1 to 3 of 3) Show per page 10 25 50

3. Confirm the removal.

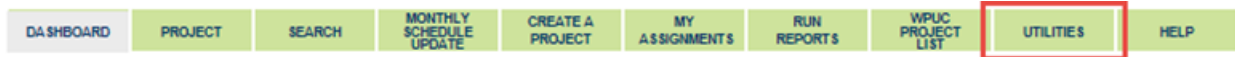


View Invoices Entry

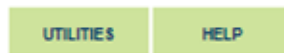
For internal and external users who do not have permissions to create, edit or remove.

1. Select Utilities button from the system toolbar.

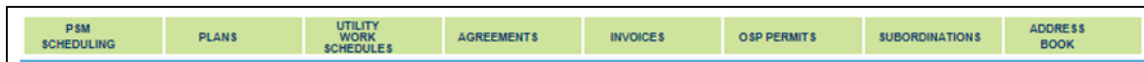
If the user is Internal the Utility button on the right side of the toolbar.



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



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



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

The screenshot shows the 'Invoices' search results page. It includes a search filter section with fields for Project, District, County, Project Phase, Contract #, Invoice Status, UAO, Invoice #, Invoice Date, and Invoice Amount. Below the search filters is a table of results with columns for Sequence, Contract #, Current Contract Amount, Invoice #, Invoice Amount, Invoice Status, Invoice Type, Invoice Date, and Invoice Period. The table contains several rows of data, including entries for 'PRELIM ENGINEERING OTHER AGENCY' and 'UTILITY RIGHT OF WAY'.

Sequence	Contract #	Current Contract Amount	Invoice #	Invoice Amount	Invoice Status	Invoice Type	Invoice Date	Invoice Period
219462-1 38	C6D19		100	\$ 3,000.00	REJECTED BY PM	FINAL	5/10/2016	6/8/2016
219462-1 32	12345				PENDING		5/12/2016	5/12/2016
219462-1 38	1001		1212		PAID		6/15/2016	6/8/2016
222530-3 38	47545		212	\$ 12.00	APPROVED	PARTIAL	5/19/2016	5/9/2016
222530-3 36	C8D19	\$ 4,123,307.00	12	\$ 12.00	PENDING	PARTIAL	5/25/2016	5/16/2016
222530-3 38	1212		64	\$ 1,950.25	PENDING	FINAL	6/28/2016	6/12/2016
222530-3 58	C8D19	\$ 4,123,307.00	100	\$ 1,900.00	PENDING	PARTIAL	5/11/2016	4/4/2016
222530-3 36	1234		1234	\$ 23,455.00	PENDING	FINAL	6/13/2016	6/13/2016
222530-3 32	12345		1234a	\$ 1,234.00	PAID	FINAL	6/6/2016	6/6/2016
222530-3 46	C8D19	\$ 4,123,307.00			PENDING			

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