

Functional Area – Plans

The Plans functional area of the Utility Module allows a user to create assignments to send contact letters with plans for review and mark up to UAOs. Other related documents such as conflict matrices can also be included in these assignments. UAOs will be able to respond to assignments by attaching their marked plans or responses to contact letters. 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 Plans functional area is accessible two ways. The first is at a Project Level which allows the user to view the Plans 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 Plans functional area for multiple project at once.

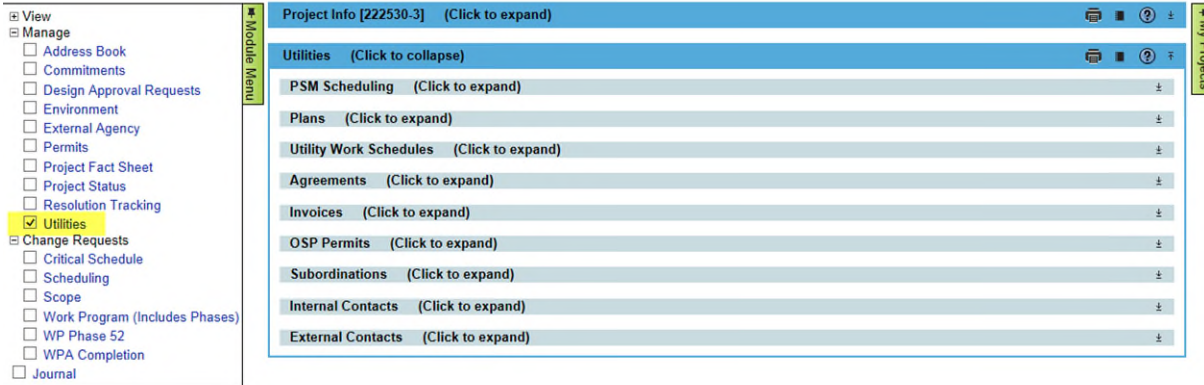
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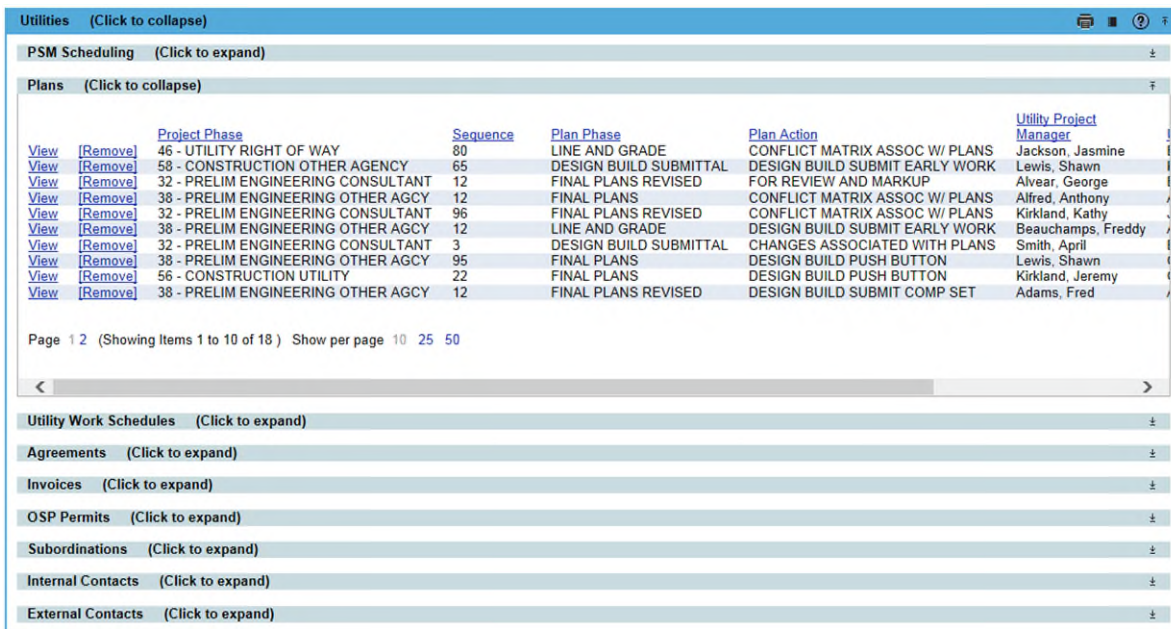
Project Level Access

All Plan 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

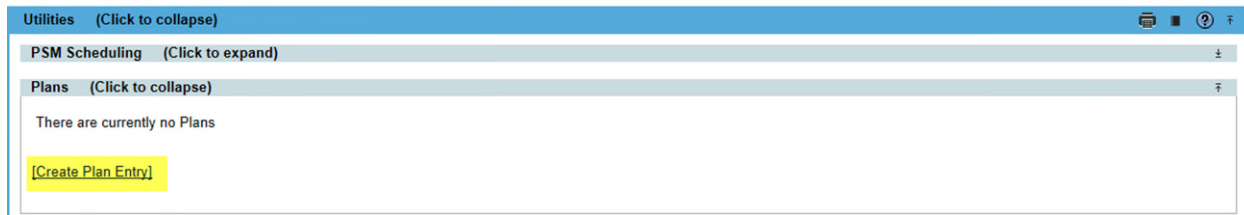



2. Click the Plans bar to expand.



Create Plans Entry

1. Click “Create Plan 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)***

Plan Phase: The current status of design plans at the time of the entry
 Plan Action: The action necessary at the time of the entry
 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 Companies
 EOR: Engineer of Record

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

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

Distribute Assignments (Click to expand) ↓

[Include Plan Document](#)

PSEE Plan Documents (Click to expand) ↓

Save Cancel

- 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.

Distribute Assignments (Click to expand) ↓

[Exclude Plan Document](#)

File: ⚠

Description: ⚠

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.

Distribute Assignments (Click to collapse) ↑

Reviewer Assignments

Due Date ⚠

UAO Representative FDOT User

Users Selected For Assignment:

FYI Assignments

UAO Representative FDOT User

Users Selected For Assignment:

Request Description 0 of 255

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)

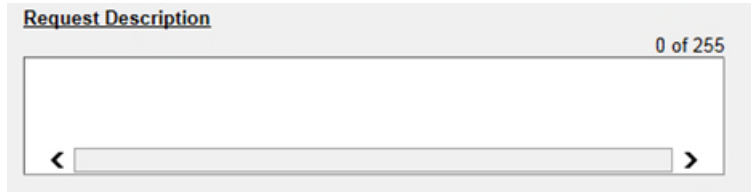
If adding a FDOT User – in the box type their name and select the appropriate user.

The screenshot shows a window titled "Distribute Assignments (Click to collapse)". Under the "Reviewer Assignments" section, there is a "Due Date" field with the value "06/30/2016". Below this are two radio buttons: "UAO Representative" (unselected) and "FDOT User" (selected). A search input field contains the text "hewett" and has a dropdown menu open showing "Hewett, Erica (PG364EH)". To the right of the search field are "Add" and "Remove" buttons.

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.

The screenshot shows the "FYI Assignments" section. It features two radio buttons: "UAO Representative" (selected) and "FDOT User" (unselected). Below the radio buttons is an empty search input field. Underneath that is a section labeled "Users Selected For Assignment:" followed by an empty rectangular box. To the right of the search field and the selected users box are "Add" and "Remove" buttons.

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 image shows a web form element titled "Request Description". It consists of a large rectangular text input area. In the top right corner of the input area, the text "0 of 255" is displayed, indicating the current character count and the maximum allowed. Below the text area is a horizontal scrollbar with left and right arrow buttons, suggesting the text area is wider than the visible window.

13. Click Save.

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

Edit Plans Entry

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

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

View	Project Phase	Sequence	Plan Phase	Plan Action	Utility Project Manager	Utility Coordinator	EOR
View	46 - UTILITY RIGHT OF WAY	80	LINE AND GRADE	CONFLICT MATRIX ASSOC W/ PLANS	Jackson, Jasmine	Baran, Gary	Cardenas, Liz
View	58 - CONSTRUCTION OTHER AGENCY	65	DESIGN BUILD SUBMITTAL	DESIGN BUILD SUBMIT EARLY WORK	Lewis, Shawn	Kirkland, Martha	Poss, Nitro
View	32 - PRELIM ENGINEERING CONSULTANT	12	FINAL PLANS REVISED	FOR REVIEW AND MARKUP	Alvear, George	Baran, Gary	Andrade, Freddy
View	38 - PRELIM ENGINEERING OTHER AGCY	12	FINAL PLANS	CONFLICT MATRIX ASSOC W/ PLANS	Alfred, Anthony	Adams, Fred	Bitar, Joe
View	32 - PRELIM ENGINEERING CONSULTANT	96	FINAL PLANS REVISED	CONFLICT MATRIX ASSOC W/ PLANS	Kirkland, Kathy	Jones, Christopher	Smith, April
View	38 - PRELIM ENGINEERING OTHER AGCY	12	LINE AND GRADE	DESIGN BUILD SUBMIT EARLY WORK	Beauchamps, Freddy	Alfred, Berline	Alfred, Anthony
View	32 - PRELIM ENGINEERING CONSULTANT	3	DESIGN BUILD SUBMITTAL	CHANGES ASSOCIATED WITH PLANS	Smith, April	Bowne, Gregory	Alexander, Alan
View	38 - PRELIM ENGINEERING OTHER AGCY	95	FINAL PLANS	DESIGN BUILD PUSH BUTTON	Lewis, Shawn	Cornwell, Katasha	Kirkland, Martha
View	56 - CONSTRUCTION UTILITY	22	FINAL PLANS	DESIGN BUILD PUSH BUTTON	Kirkland, Jeremy	Cornwell, Katasha	Rivera, Alberto
View	38 - PRELIM ENGINEERING OTHER AGCY	12	FINAL PLANS REVISED	DESIGN BUILD SUBMIT COMP SET	Adams, Fred	Alfred, Berline	Aminana, Freddy

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

[Return to List](#)
 Project Phase: 46 - UTILITY RIGHT OF WAY
 Sequence: 80
 Plan Phase: LINE AND GRADE
 Plan Action: CONFLICT MATRIX ASSOC W/ PLANS
 Utility Project Manager: Jasmine Jackson
 Utility Coordinator: Gary Baran
 EOR: Liz Cardenas
 Created On: 6/1/2016

[Edit](#)

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

Project: 222530 - 3
 Project Phase: 46 - UTILITY RIGHT OF WAY
 Sequence: 80
 Plan Phase: LINE AND GRADE
 Plan Action: CONFLICT MATRIX ASSOC W/ PLANS
 Utility Project Manager: Jasmine Jackson
 Utility Coordinator: Gary Baran
 EOR: Liz Cardenas

Distribute Assignments
Reviewer Assignments
 Due Date:
 UAO Representative FDOT User
 Users Selected For Assignment:
FVI Assignments
 UAO Representative FDOT User
 Users Selected For Assignment:
 Request Description: 0 of 255
Exclude Plan Document
 File: 0 %
 Description: 0 of 200

PSEE Plan Documents

EDMS Doc No	Created Date	Document Name	Description	Type
5003515	6/7/2016	PSFF Document -	text new doc	PLANS

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

Project Phase	Sequence	Plan Phase	Plan Action	Utility Project Manager	Utility Coordinator	EOB
View 46 - UTILITY RIGHT OF WAY	80	LINE AND GRADE	CONFLICT MATRIX ASSOC W/ PLANS	Jackson, Jasmine	Baran, Gary	Cardenas, Liz
View 55 - CONSTRUCTION OTHER AGENCY	65	DESIGN BUILD SUBMITTAL	DESIGN BUILD SUBMIT EARLY WORK	Lewis, Shawn	Kirkland, Martha	Poss, Mero
View 32 - PRELIM ENGINEERING CONSULTANT	12	FINAL PLANS REVISED	FOR REVIEW AND MARKUP	Alvear, George	Baran, Gary	Andrade, Freddy
View 38 - PRELIM ENGINEERING OTHER AGCY	12	FINAL PLANS	CONFLICT MATRIX ASSOC W/ PLANS	Alfred, Anthony	Adams, Fred	Blair, Joe
View 32 - PRELIM ENGINEERING CONSULTANT	96	FINAL PLANS REVISED	CONFLICT MATRIX ASSOC W/ PLANS	Kirkland, Kathy	Jones, Christopher	Smith, April
View 38 - PRELIM ENGINEERING OTHER AGCY	12	LINE AND GRADE	DESIGN BUILD SUBMIT EARLY WORK	Beauchamps, Freddy	Alfred, Berline	Alfred, Anthony
View 32 - PRELIM ENGINEERING CONSULTANT	3	DESIGN BUILD SUBMITTAL	CHANGES ASSOCIATED WITH PLANS	Smith, April	Bowne, Gregory	Alexander, Alan
View 38 - PRELIM ENGINEERING OTHER AGCY	95	FINAL PLANS	DESIGN BUILD PUSH BUTTON	Lewis, Shawn	Cornwell, Kataksha	Kirkland, Martha
View 46 - CONSTRUCTION UTILITY	22	FINAL PLANS	DESIGN BUILD PUSH BUTTON	Kirkland, Jeremy	Cornwell, Kataksha	Rivera, Alberto
View 38 - PRELIM ENGINEERING OTHER AGCY	12	FINAL PLANS REVISED	DESIGN BUILD SUBMIT COMP SET	Adams, Fred	Alfred, Berline	Aminana, Freddy

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: 46 - UTILITY RIGHT OF WAY
 Reviewer: Dairy Queen Tallahassee - Monroe - DUANE DAUNT
 Due Date: 6/30/2016
 Assignment Status: **IN PROGRESS** (selected)
 Assignment Type: Plan
 Sequence: 80
 Request Description:
[Include Plan Document](#)

Legend:
 CANCELED
 COMPLETE
IN PROGRESS
 ISSUE CANCELED
 ISSUE COMPLETE

PSEE Plan 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 Plans Entry

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

Project Phase	Sequence	Plan Phase	Plan Action	Utility Project Manager	Utility Coordinator	FOR
View 46 - UTILITY RIGHT OF WAY	80	LINE AND GRADE	CONFLICT MATRIX ASSOC W/ PLANS	Jackson, Jasmine	Baran, Gary	Cardenas, Liz
View 55 - CONSTRUCTION OTHER AGENCY	65	DESIGN BUILD SUBMITTAL	DESIGN BUILD SUBMIT EARLY WORK	Lewis, Shawn	Kirkland, Martha	Poss, Miro
View 32 - PRELIM ENGINEERING CONSULTANT	12	FINAL PLANS REVISED	FOR REVIEW AND MARKUP	Alnear, George	Baran, Gary	Andrade, Freddy
View 38 - PRELIM ENGINEERING OTHER AGENCY	12	FINAL PLANS	CONFLICT MATRIX ASSOC W/ PLANS	Alfred, Anthony	Adams, Fred	Blair, Joe
View 32 - PRELIM ENGINEERING CONSULTANT	96	FINAL PLANS REVISED	CONFLICT MATRIX ASSOC W/ PLANS	Kirkland, Kathy	Jones, Christopher	Smith, April
View 38 - PRELIM ENGINEERING OTHER AGENCY	12	LINE AND GRADE	DESIGN BUILD SUBMIT EARLY WORK	Beauchamps, Freddy	Alfred, Berline	Alfred, Anthony
View 32 - PRELIM ENGINEERING CONSULTANT	3	DESIGN BUILD SUBMITTAL	CHANGES ASSOCIATED WITH PLANS	Smith, April	Bowne, Gregory	Alexander, Alan
View 38 - PRELIM ENGINEERING OTHER AGENCY	95	FINAL PLANS	DESIGN BUILD PUSH BUTTON	Lewis, Shawn	Cornwell, Katakasha	Kirkland, Martha
View 55 - CONSTRUCTION UTILITY	22	FINAL PLANS	DESIGN BUILD PUSH BUTTON	Kirkland, Jeremy	Cornwell, Katakasha	Rivera, Alberto
View 38 - PRELIM ENGINEERING OTHER AGENCY	12	FINAL PLANS REVISED	DESIGN BUILD SUBMIT COMP SET	Adams, Fred	Alfred, Berline	Aminana, Freddy

2. Scroll to the Comments area and click Add Comment

Comments For Plan 222530-3 (Click to collapse)

Jeff Moore @ 6/13/2016 11:01:08 AM:
This is a test

[\[Add Comment\]](#)

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.

Add Comment

Adding Comment To Plan for 222530-3

0 of 255

Comment:

Save Cancel

NOTE: Comments CAN NOT be edited or removed.

Remove Plans Entry

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

Project Phase	Sequence	Plan Phase	Plan Action	Utility Project Manager	Utility Coordinator	FOR
View 46 - UTILITY RIGHT OF WAY	80	LINE AND GRADE	CONFLICT MATRIX ASSOC W/ PLANS	Jackson, Jasmine	Baran, Gary	Cardenas, Liz
View 55 - CONSTRUCTION OTHER AGENCY	65	DESIGN BUILD SUBMITTAL	DESIGN BUILD SUBMIT EARLY WORK	Lewis, Shawn	Kirkland, Martha	Poss, Miro
View 32 - PRELIM ENGINEERING CONSULTANT	12	FINAL PLANS REVISED	FOR REVIEW AND MARKUP	Alnear, George	Baran, Gary	Andrade, Freddy
View 38 - PRELIM ENGINEERING OTHER AGENCY	12	FINAL PLANS	CONFLICT MATRIX ASSOC W/ PLANS	Alfred, Anthony	Adams, Fred	Blair, Joe
View 32 - PRELIM ENGINEERING CONSULTANT	96	FINAL PLANS REVISED	CONFLICT MATRIX ASSOC W/ PLANS	Kirkland, Kathy	Jones, Christopher	Smith, April
View 38 - PRELIM ENGINEERING OTHER AGENCY	12	LINE AND GRADE	DESIGN BUILD SUBMIT EARLY WORK	Beauchamps, Freddy	Alfred, Berline	Alfred, Anthony
View 32 - PRELIM ENGINEERING CONSULTANT	3	DESIGN BUILD SUBMITTAL	CHANGES ASSOCIATED WITH PLANS	Smith, April	Bowne, Gregory	Alexander, Alan
View 38 - PRELIM ENGINEERING OTHER AGENCY	95	FINAL PLANS	DESIGN BUILD PUSH BUTTON	Lewis, Shawn	Cornwell, Katakasha	Kirkland, Martha
View 55 - CONSTRUCTION UTILITY	22	FINAL PLANS	DESIGN BUILD PUSH BUTTON	Kirkland, Jeremy	Cornwell, Katakasha	Rivera, Alberto
View 38 - PRELIM ENGINEERING OTHER AGENCY	12	FINAL PLANS REVISED	DESIGN BUILD SUBMIT COMP SET	Adams, Fred	Alfred, Berline	Aminana, Freddy

2. Click Remove next to the appropriate existing Plan entry.

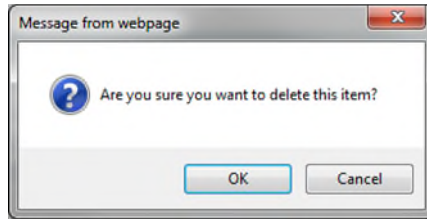
Plans (Click to collapse)

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

[\[Create Plan Entry\]](#)

Page 1 (Showing Items 1 to 1 of 1)

3. Confirm the removal.



NOTE: Comments CAN NOT be edited or removed.

Remove Assignments from existing Plans Entry

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

Project Phase	Sequence	Plan Phase	Plan Action	Utility Project Manager	Utility Coordinator	EOB
View 46 - UTILITY RIGHT OF WAY	80	LINE AND GRADE	CONFLICT MATRIX ASSOC W/ PLANS	Jackson, Jasmine	Baran, Gary	Cardenas, Liz
View 55 - CONSTRUCTION OTHER AGENCY	95	DESIGN BUILD SUBMITTAL	DESIGN BUILD SUBMIT EARLY WORK FOR REVIEW AND MARKUP	Lewis, Shawn	Kirkland, Martha	Poss, Mero
View 32 - PRELIM ENGINEERING CONSULTANT	12	FINAL PLANS REVISED	CONFLICT MATRIX ASSOC W/ PLANS	Alvare, George	Baran, Gary	Andrade, Freddy
View 38 - PRELIM ENGINEERING OTHER AGENCY	12	FINAL PLANS	CONFLICT MATRIX ASSOC W/ PLANS	Alfred, Anthony	Adams, Fred	Bilar, Joe
View 32 - PRELIM ENGINEERING CONSULTANT	96	FINAL PLANS REVISED	CONFLICT MATRIX ASSOC W/ PLANS	Kirkland, Kathy	Jones, Christopher	Smith, April
View 38 - PRELIM ENGINEERING OTHER AGENCY	12	LINE AND GRADE	DESIGN BUILD SUBMIT EARLY WORK	Beauchamps, Freddy	Alfred, Berline	Alfred, Anthony
View 32 - PRELIM ENGINEERING CONSULTANT	3	DESIGN BUILD SUBMITTAL	CHANGES ASSOCIATED WITH PLANS	Smith, April	Bowne, Gregory	Alexander, Alan
View 38 - PRELIM ENGINEERING OTHER AGENCY	95	FINAL PLANS	DESIGN BUILD PUSH BUTTON	Lewis, Shawn	Cornwell, Katalaha	Kirkland, Martha
View 55 - CONSTRUCTION UTILITY	22	FINAL PLANS	DESIGN BUILD PUSH BUTTON	Kirkland, Jeremy	Cornwell, Katalaha	Rivera, Alberto
View 38 - PRELIM ENGINEERING OTHER AGENCY	12	FINAL PLANS REVISED	DESIGN BUILD SUBMIT COMP SET	Adams, Fred	Alfred, Berline	Aminana, Freddy

2. Click Remove next the appropriate assignment.

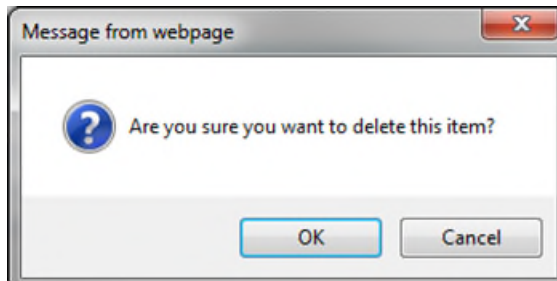
Reviewer	Assignment Status	Due Date	Completed Date	Request Description
View Remove Carla Hodges	IN PROGRESS	6/30/2016		test
View Remove Dairy Queen Tallahassee - ANDY ROBERTS	IN PROGRESS	7/1/2017		
View Remove Dairy Queen Tallahassee - DUANE DAUNT	IN PROGRESS	7/1/2016		
View Remove Dairy Queen - WALTER 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](#)
Page 1 (Showing Items 1 to 8 of 8) Show per page 10 25 50

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 Plans Entry

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

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

Utilites (Click to collapse)							
PSM Scheduling (Click to expand)							
Plans (Click to collapse)							
	Project Phase	Sequence	Plan Phase	Plan Action	Utility Project Manager	Utility Coordinator	EDR
View	46 - UTILITY RIGHT OF WAY	80	LINE AND GRADE	CONFLICT MATRIX ASSOC W/ PLANS	Jackson, Jasmine	Baran, Gary	Cardenas, Liz
View	58 - CONSTRUCTION OTHER AGENCY	65	DESIGN BUILD SUBMITTAL	DESIGN BUILD SUBMIT EARLY WORK	Lewis, Shawn	Kirkland, Martha	Posa, Miro
View	32 - PRELIM ENGINEERING CONSULTANT	12	FINAL PLANS REVISED	FOR REVIEW AND MARKUP	Alvare, George	Baran, Gary	Andrade, Freddy
View	38 - PRELIM ENGINEERING OTHER AGCY	12	FINAL PLANS	CONFLICT MATRIX ASSOC W/ PLANS	Alfred, Anthony	Adams, Fred	Bilar, Joe
View	32 - PRELIM ENGINEERING CONSULTANT	96	FINAL PLANS REVISED	CONFLICT MATRIX ASSOC W/ PLANS	Kirkland, Kathy	Jones, Christopher	Smith, April
View	38 - PRELIM ENGINEERING OTHER AGCY	12	LINE AND GRADE	DESIGN BUILD SUBMIT EARLY WORK	Beauchamps, Freddy	Alfred, Berline	Alfred, Anthony
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View	56 - CONSTRUCTION UTILITY	22	FINAL PLANS	DESIGN BUILD PUSH BUTTON	Kirkland, Jeremy	Cornwell, Katsasha	Rivera, Alberlo
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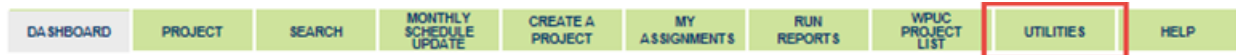
Page 1 2 3 (Showing Items 1 to 10 of 22) Show per page 10 25 50

2. Scroll through to see the entire Plans Entry details.

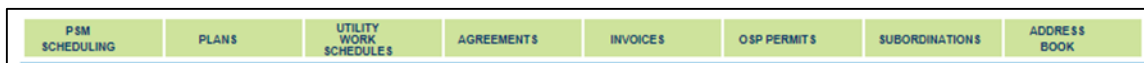
System Level Access

Plan 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 Plans button.



Create Plans Entry

1. Click “Create Plan Entry” link.

The 'Plans' search interface includes a search bar, dropdown menus for Project, District, and County, and input fields for Project Phase, Plan Phase, Utility Project Manager, EOR, Sequence, Plan Action, and Utility Coordinator. A yellow button labeled 'Create Plan Entry' is visible at the bottom left.

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

The 'Create Plan Entry' form contains input fields for Project, Project Phase, Sequence, Plan Phase, Plan Action, Utility Project Manager, Utility Coordinator, and EOR. Warning icons (triangles with exclamation marks) are placed next to the Project, Plan Phase, Plan Action, Utility Coordinator, and EOR fields. There are also expandable sections for 'Distribute Assignments' and 'PSEE Plan Documents', and 'Save' and 'Cancel' buttons at the bottom.

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)

Plan Phase:	The current status of design plans at the time of the entry
Plan Action:	The action necessary at the time of the entry
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 Companies
EOR:	Engineer of Record

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

- Click "Include Plan 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.
- 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

Users Selected For Assignment:

Add

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

< >

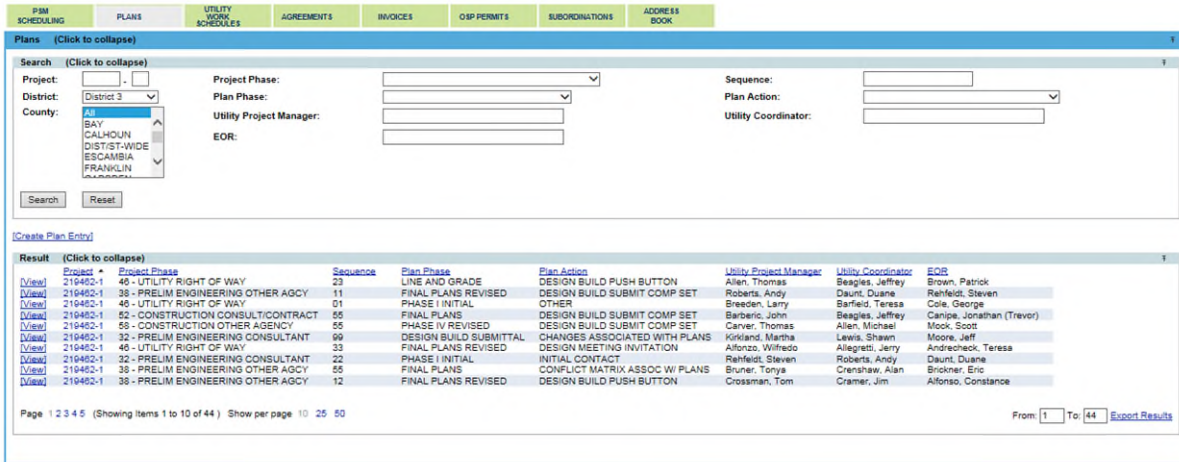
13. Click Save.

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

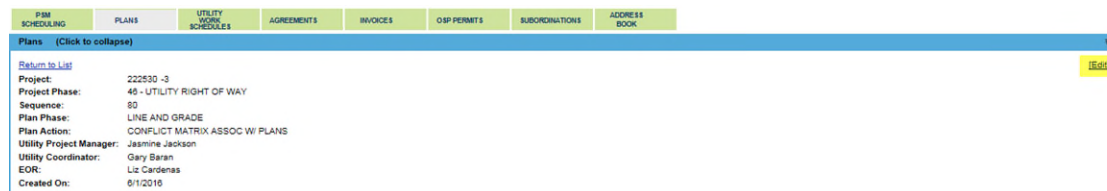
Edit Plans Entry

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

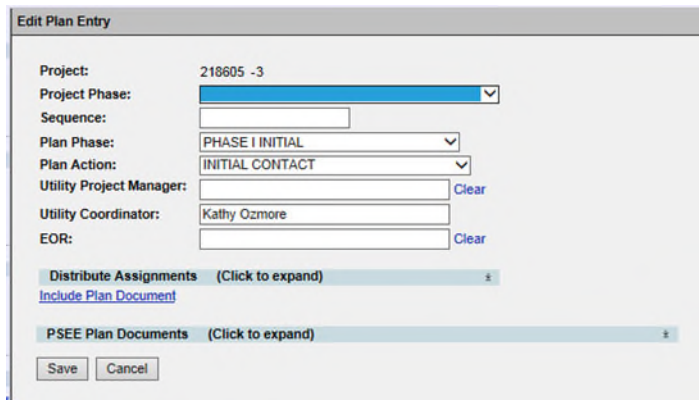
1. In the Results submodule of Plans section, Select “View” next to existing Entry needing modifications.



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



3. The Edit Plan Entry box will open. Modify the areas necessary. Refer to the Create Plan 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 Plans section, Select “View” next to existing Entry needing modifications.

Plans (Click to collapse)

Search (Click to collapse)

Project: Project Phase:

District: Plan Phase:

County: Utility Project Manager:

EOR:

Sequence:

Plan Action:

Utility Coordinator:

Search Reset

[Create Plan Entry](#)

Result (Click to collapse)

Project	Project Phase	Sequence	Plan Phase	Plan Action	Utility Project Manager	Utility Coordinator	EOR
View 210402-1	46 - UTILITY RIGHT OF WAY	23	LINE AND GRADE	DESIGN BUILD PUSH BUTTON	Allen, Thomas	Beagles, Jeffrey	Brown, Patrick
View 210402-1	38 - PRELIM ENGINEERING OTHER AGENCY	11	FINAL PLANS REVISED	DESIGN BUILD SUBMIT COMP SET	Roberts, Andy	Daunt, Duane	Rehfeld, Steven
View 210402-1	46 - UTILITY RIGHT OF WAY	01	PHASE I INITIAL	OTHER	Breeden, Larry	Barfield, Teresa	Cole, George
View 210402-1	62 - CONSTRUCTION CONSULT/CONTRACT	69	FINAL PLANS	DESIGN BUILD SUBMIT COMP SET	Barberic, John	Beagles, Jeffrey	Canipe, Jonathan (Trevor)
View 210402-1	68 - CONSTRUCTION OTHER AGENCY	55	PHASE IV REVISED	DESIGN BUILD SUBMIT COMP SET	Carver, Thomas	Allen, Michael	Mook, Scott
View 210402-1	32 - PRELIM ENGINEERING CONSULTANT	99	DESIGN BUILD SUBMITTAL	CHANGES ASSOCIATED WITH PLANS	Kirkland, Martha	Lewis, Shawn	Moore, Jeff
View 210402-1	46 - UTILITY RIGHT OF WAY	33	FINAL PLANS REVISED	DESIGN MEETING INVITATION	Alfonzo, Wilfredo	Allegretti, Jerry	Andrecheck, Teresa
View 210402-1	32 - PRELIM ENGINEERING CONSULTANT	22	PHASE I INITIAL	INITIAL CONTACT	Rehfeld, Steven	Roberts, Andy	Daunt, Duane
View 210402-1	38 - PRELIM ENGINEERING OTHER AGENCY	55	FINAL PLANS	CONFLICT MATRIX ASSOC W/ PLANS	Bruner, Tonya	Crenshaw, Alan	Brooker, Eric
View 210402-1	38 - PRELIM ENGINEERING OTHER AGENCY	12	FINAL PLANS REVISED	DESIGN BUILD PUSH BUTTON	Crossman, Tom	Cramer, Jim	Alfonso, Constance

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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	

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

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

Edit Reviewer Assignment Entry

Project: 222530- 3

Project Phase: 46 - UTILITY RIGHT OF WAY

Reviewer: Dairy Queen Tallahassee - Monroe - DUANE DAUNT

Due Date: 6/30/2016

Assignment Status:

Assignment Type: Plan

Sequence: 80

Request Description:

[Include Plan Document](#)

PSEE Plan Documents (Click to expand)

Save Cancel

CANCELED

COMPLETE

IN PROGRESS

ISSUE CANCELED

ISSUE COMPLETE

will

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 Plans Entry

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

The screenshot shows the 'Plans' application interface. At the top, there are navigation tabs: PSM SCHEDULING, PLANS, UTILITY WORK SCHEDULES, AGREEMENTS, INVOICES, OSP PERMITS, SUBORDINATIONS, and ADDRESS BOOK. The 'Plans' tab is active. Below the tabs is a search area with the following fields:

- Project: []
- District: [District 3]
- County: [AY] (dropdown menu with options: BAY, CALHOUN, DIST/ST-WIDE, ESCAMBIA, FRANKLIN, ALABAMA)
- Project Phase: []
- Plan Phase: []
- Utility Project Manager: []
- EOR: []
- Sequence: []
- Plan Action: []
- Utility Coordinator: []

Below the search area is a table of results. The table has columns: Project, Project Phase, Sequence, Plan Phase, Plan Action, Utility Project Manager, Utility Coordinator, and EOR. The table contains 10 rows of data, each with a 'View' link next to the Project column.

Project	Project Phase	Sequence	Plan Phase	Plan Action	Utility Project Manager	Utility Coordinator	EOR
219492-1	48 - UTILITY RIGHT OF WAY	23	LINE AND GRADE	DESIGN BUILD PUSH BUTTON	Allen, Thomas	Seagles, Jeffrey	Brown, Patrick
219492-1	38 - PRELIM ENGINEERING OTHER AGENCY	11	FINAL PLANS REVISED	DESIGN BUILD SUBMIT COMP SET	Roberts, Andy	Daunt, Duane	Rehfeldt, Steven
219492-1	48 - UTILITY RIGHT OF WAY	01	PHASE I INITIAL	OTHER	Breeden, Larry	Barfield, Teresa	Cole, George
219492-1	52 - CONSTRUCTION CONSULT/CONTRACT	55	FINAL PLANS	DESIGN BUILD SUBMIT COMP SET	Barbers, John	Seagles, Jeffrey	Carpio, Jonathan (Trevor)
219492-1	58 - CONSTRUCTION OTHER AGENCY	55	PHASE IV REVISED	DESIGN BUILD SUBMIT COMP SET	Carver, Thomas	Allen, Michael	Mock, Scott
219492-1	32 - PRELIM ENGINEERING CONSULTANT	99	DESIGN BUILD SUBMITTAL	CHANGES ASSOCIATED WITH PLANS	Kirkland, Martha	Lewis, Shawn	Moore, Jeff
219492-1	48 - UTILITY RIGHT OF WAY	33	FINAL PLANS REVISED	DESIGN MEETING INVITATION	Alfonzo, Wilfredo	Allagretti, Jerry	Andrecheck, Teresa
219492-1	32 - PRELIM ENGINEERING CONSULTANT	22	PHASE I INITIAL	INITIAL CONTACT	Rehfeldt, Steven	Roberts, Andy	Daunt, Duane
219492-1	38 - PRELIM ENGINEERING OTHER AGENCY	55	FINAL PLANS	CONFLICT MATRIX ASSOC W/ PLANS	Bruner, Tonya	Crenshaw, Alan	Brickner, Eric
219492-1	38 - PRELIM ENGINEERING OTHER AGENCY	12	FINAL PLANS REVISED	DESIGN BUILD PUSH BUTTON	Crossman, Tom	Cramer, Jim	Alfonso, Constance

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2. Scroll to the Comments area and click Add Comment

The screenshot shows the 'Comments For Plan 222530-3' dialog box. It has a title bar that says 'Comments For Plan 222530-3 (Click to collapse)'. Inside the dialog, there is a text area containing the following text:

Jeff Moore @ 6/13/2016 11:01:08 AM:
This is a test

Below the text area is an '[Add Comment]' link. At the bottom of the dialog, there is a page indicator: '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.

The screenshot shows the 'Add Comment' dialog box. It has a title bar that says 'Add Comment'. Inside the dialog, there is a text area containing the following text:

Adding Comment To Plan for 222530-3

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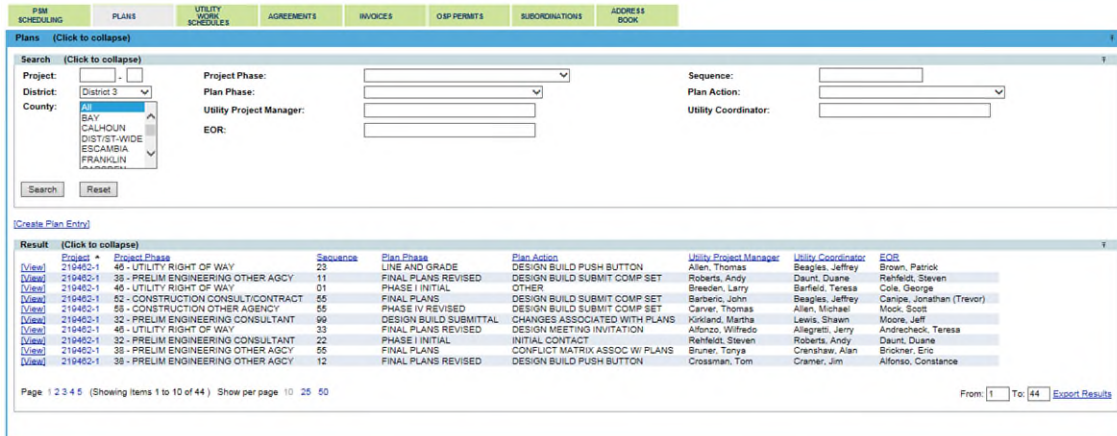
Comment:

Below the text area are 'Save' and 'Cancel' buttons.

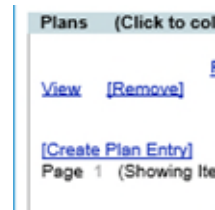
NOTE: Comments CAN NOT be edited or removed.

Remove Plans Entry

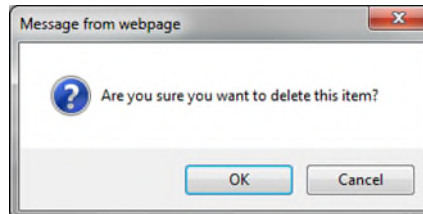
1. In the Results submodule of Utility Work Schedules (UWS) section, if you have the privilege, the “Remove” option will appear between “View” and the Project Number of the existing Entry needing modifications.



2. Click Remove next to the appropriate entry.



3. Confirm the removal.



NOTE: This action CAN NOT be undone.

Remove Assignments from existing Plans Entry

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

Plans (Click to collapse)

Search (Click to collapse)

Project: Project Phase:

District: Plan Phase:

County: Utility Project Manager:

EOR:

Sequence:

Plan Action:

Utility Coordinator:

[Search](#) [Reset](#)

[Create Plan Entry](#)

Result (Click to collapse)

Project	Project Phase	Sequence	Plan Phase	Plan Action	Utility Project Manager	Utility Coordinator	EOR
View 210402-1	46 - UTILITY RIGHT OF WAY	23	LINE AND GRADE	DESIGN BUILD PUSH BUTTON	Allen, Thomas	Beagles, Jeffrey	Brown, Patrick
View 210402-1	38 - PRELIM ENGINEERING OTHER AGENCY	11	FINAL PLANS REVISED	DESIGN BUILD SUBMIT COMP SET	Roberts, Andy	Daunt, Duane	Rahfield, Steven
View 210402-1	46 - UTILITY RIGHT OF WAY	01	PHASE I INITIAL	OTHER	Breeden, Larry	Barfield, Teresa	Cole, George
View 210402-1	62 - CONSTRUCTION CONSULT/CONTRACT	99	FINAL PLANS	DESIGN BUILD SUBMIT COMP SET	Barbenc, John	Beagles, Jeffrey	Canipe, Jonathan (Trevor)
View 210402-1	68 - CONSTRUCTION OTHER AGENCY	55	PHASE IV REVISED	DESIGN BUILD SUBMIT COMP SET	Carver, Thomas	Allen, Michael	Mook, Scott
View 210402-1	32 - PRELIM ENGINEERING CONSULTANT	59	DESIGN BUILD SUBMITTAL	CHANGES ASSOCIATED WITH PLANS	Kirkland, Martha	Lewis, Shawn	Moore, Jeff
View 210402-1	46 - UTILITY RIGHT OF WAY	33	FINAL PLANS REVISED	DESIGN MEETING INVITATION	Alfonzo, Wilfredo	Allegretti, Jerry	Andrecheck, Teresa
View 210402-1	32 - PRELIM ENGINEERING CONSULTANT	22	PHASE I INITIAL	INITIAL CONTACT	Rahfield, Steven	Roberts, Andy	Daunt, Duane
View 210402-1	38 - PRELIM ENGINEERING OTHER AGENCY	55	FINAL PLANS	CONFLICT MATRIX ASSOC W/ PLANS	Bruner, Tonya	Crenshaw, Alan	Brooker, Eric
View 210402-1	38 - PRELIM ENGINEERING OTHER AGENCY	12	FINAL PLANS REVISED	DESIGN BUILD PUSH BUTTON	Crossman, Tom	Cramer, Jim	Alfonzo, Constance

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From To [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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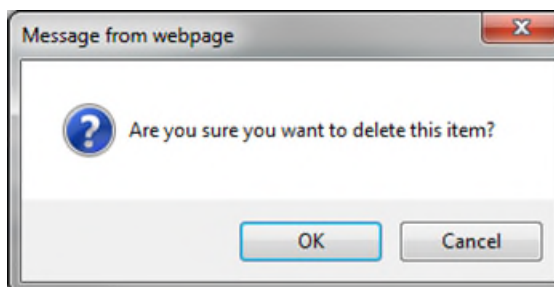
FYI Assignments (Click to collapse)

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](#)

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3. Confirm the removal.

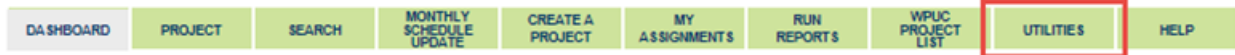


View Plans Entry

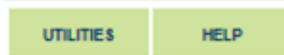
For users who do not have permissions to create, edit or remove.

1. Select Utilities button from the system toolbar.

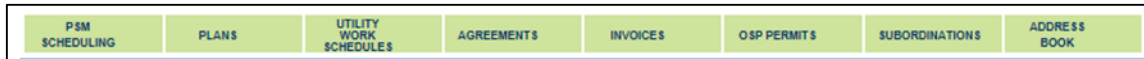
If the user is Internal the Utility button on the right side of the toolbar.



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



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



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

The screenshot shows the 'Plans' section of the system. At the top, there is a search filter with fields for Project, District, County, Project Phase, Plan Phase, Utility Project Manager, EOR, Sequence, Plan Action, and Utility Coordinator. Below the search filter is a table of results. The table has columns for Project, Plan Phase, Sequence, Plan Phase, Plan Action, Utility Project Manager, Utility Coordinator, and EOR. Each row represents a plan entry, and a 'View' link is provided for each entry.

Project	Plan Phase	Sequence	Plan Phase	Plan Action	Utility Project Manager	Utility Coordinator	EOR
219492-1	48 - UTILITY RIGHT OF WAY	23	LINE AND GRADE	DESIGN BUILD PUSH BUTTON	Allen, Thomas	Seagles, Jeffrey	Brown, Patrick
219492-1	38 - PRELIM ENGINEERING OTHER AGENCY	11	FINAL PLANS REVISED	DESIGN BUILD SUBMIT COMP SET	Roberts, Andy	Daunt, Duane	Rehfeldt, Steven
219492-1	48 - UTILITY RIGHT OF WAY	01	PHASE INITIAL	OTHER	Breeden, Larry	Barfield, Teresa	Cole, George
219492-1	82 - CONSTRUCTION CONSULT/CONTRACT	55	FINAL PLANS	DESIGN BUILD SUBMIT COMP SET	Barberic, John	Seagles, Jeffrey	Carline, Jonathan (Trevor)
219492-1	58 - CONSTRUCTION OTHER AGENCY	55	PHASE IV REVISED	DESIGN BUILD SUBMIT COMP SET	Carver, Thomas	Allen, Michael	Mock, Scott
219492-1	32 - PRELIM ENGINEERING CONSULTANT	99	DESIGN BUILD SUBMITTAL	CHANGES ASSOCIATED WITH PLANS	Kirkland, Martha	Lewis, Shawn	Moore, Jeff
219492-1	48 - UTILITY RIGHT OF WAY	33	FINAL PLANS REVISED	DESIGN MEETING INVITATION	Alfonzo, Wilfredo	Allegretti, Jerry	Andrecheck, Teresa
219492-1	32 - PRELIM ENGINEERING CONSULTANT	22	PHASE INITIAL	INITIAL CONTACT	Rehfeldt, Steven	Roberts, Andy	Daunt, Duane
219492-1	38 - PRELIM ENGINEERING OTHER AGENCY	55	FINAL PLANS	CONFLICT MATRIX ASSOC W/ PLANS	Bruner, Tonya	Crenshaw, Alan	Brokner, Eric
219492-1	38 - PRELIM ENGINEERING OTHER AGENCY	12	FINAL PLANS REVISED	DESIGN BUILD PUSH BUTTON	Crossman, Tom	Cramer, Jim	Alfonso, Constance

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