



Sean Masters, P.E, AVS
Project Review



Objectives

- Benefits of ERC
- Recent Successes!
- Basic Workflow
- Account types
- Common Problems





BENEFITS OF ERC



Who wants more email?

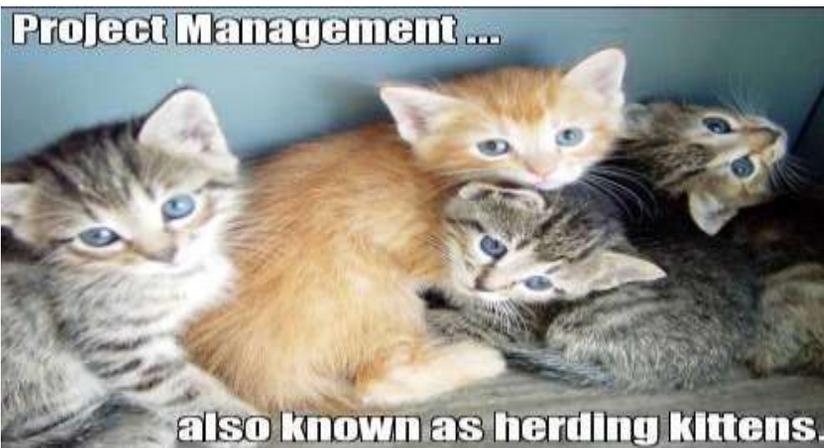
- Who averages more than 25 emails a day?
- Who averages more than 50 emails a day?
- Who averages more than 100 emails a day?



Email fatigue



Project Management means Communication



The good old days were not so good....



Moving to digital helped. Sort of...

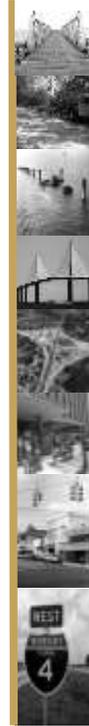


www.jesperdeleuran.dk



The Perfect Comment System

- Stand alone system
- Simple to use
- Anyone can access through the Internet
- Flexible and Dynamic
- Allows the sharing of documents



The Perfect Comment System

ERC!



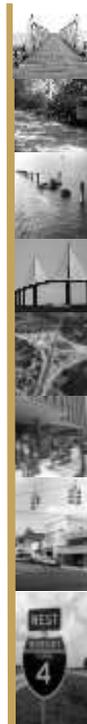
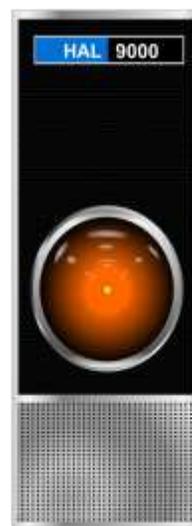
Benefits of ERC

- Centralized location for all comments & responses
- Allows for easy tracking of review status
- Archives submittals for future reference
- Sends automatic email notices for new entries, due date reminders, late comments and responses notifications



ERC Factoids

- Active users in 2014: 2553
- Submittals in 2014: 6448
 - Up 16%!





RECENT SUCCESSES IN ERC



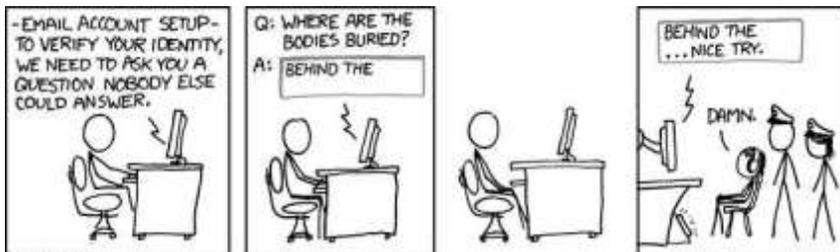
ERC moved to a new server!

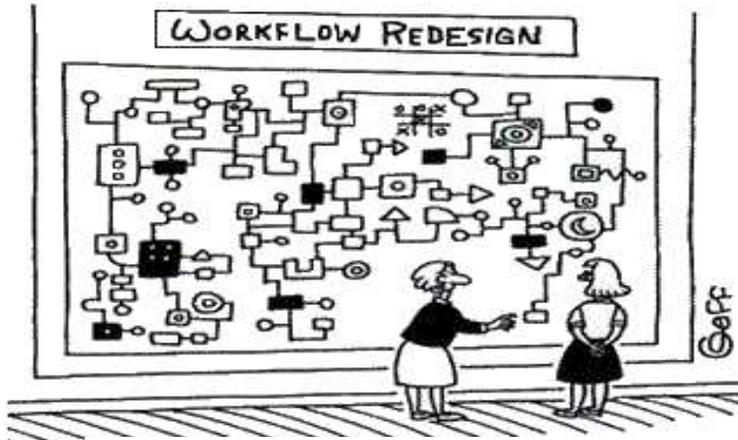


Turnpike moved to ERC!



File document access restricted to assigned submittal users





"And this is where our workflow redesign team went insane"

BASIC WORKFLOW....



ERC User Accounts



RACF versus ISA

• RACF

- A.K.A. “Mainframe”
- Resource Access Control Facility
- Looks like “KNOSSOS” or “SP123SM”
- Managed by OIS

• ISA

- Internet Subscription Account
- Allows people outside the FDOT to access
- Looks like “MrRogers@PBS.ORG”
- Managed by the Project Review Office



Creating an ISA account

By logging on to a FDOT system, you acknowledge your responsibility to comply with all laws, rules, directives, policies, and procedures related to the use and security of information technology resources. Unauthorized use is strictly prohibited. You are hereby on notice that you should have no expectation of privacy as to your use of Department information technology resources as all data is potentially subject to Florida's public records law.

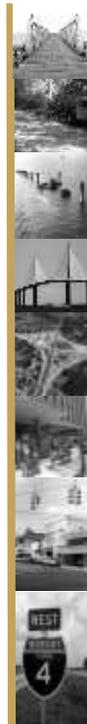
User ID:

Password:

[Log In](#)
[Forgot Password](#)

If you are a FDOT staff or a Consultant with a RACFid (Mainframe ID), please use your RACFid (Mainframe ID) to login to ERC application.
If you are a Consultant user that does not have a RACFid (Mainframe ID), please use your Internet Subscriber Account (ISA) to login to ERC application.
If you don't have an account, which means you are a new one:
[Create a new ISA account](#)

Click to click an ISA account



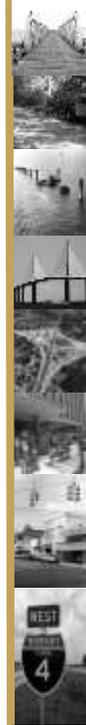
Creating an ISA account

Electronic Review Comments
Create ISA Account

First Name: _____ Last Name: _____
 Email: _____ Phone: (000-000-0000)
 Company: _____ Password Challenge Question: WHAT IS YOUR MOTHER'S MAIDEN NAME?
 Answer to Password Challenge Question: _____

Terms of Use I have read and agree with the terms of use
 [Back to homepage](#)

Complete the information, read Terms of Use, check the box and click 'Create'



Setting up an ISA Account

my Internet Subscriber Account

[My Account](#) / [My Services](#)

Email Address: KLEBLONG8@EMBARQMAIL.COM
 First Name: KURT
 Last Name: LIEBLONG
 Company Name: FDOT
 Phone Number: (850) 414-4737
 Status: ACTIVE ACCOUNT

Challenge Question: WHAT IS YOUR MOTHER'S MAIDEN NAME?
 Challenge Answer: _____

[Change Email Address](#)
 DO NOT REPLY TO SENDER

Update your information and click Update

Update your Challenge Question and Answer

Please remember if you change your e-mail address, this will change your ISA User Id



What if you have two accounts...



What if you have two accounts...

- 1) Contact PM or District ERC administrator
- 2) The RACF is the preferred account.
- 3) All open submittals will be transferred to one account.
- 4) Extra ISA accounts are inactivated



Consultants with RACF accounts...

- “KN” accounts are only good for contract.
- Access can be extended with new contracts...
- Every time you get a new contract, request for RACF access.



What you do NOT want to happen

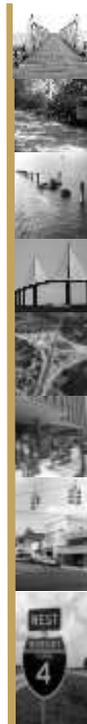


Getting Started with ERC....



Home Page

Reviewed Submissions	Phase	By Date	Contract No. Date	Response Due Date	Comments Submitted
[Link]	FINAL	BLHOUSE PROJECT MANAGER	6/15/12	6/15/12	3
[Link]	FINAL	REVIEWER	6/12/12	6/12/12	4
[Link]	FINAL	CONSULTANT PROJECT MANAGER	6/12/11	6/12/11	30



Home Page

-  Green indicates that the due date is more than 1 week away
-  Yellow indicates that the due date is within 1 week
-  Red indicates that the due date has passed
-  Blue indicates that the due date has passed and there is nothing assigned for action



Home Page



Electronic Review Comments

User: 6476 / Role: STAFF USER | Date: 06/18/2015 | Profile: Staff

Assigned Submittals: Total: 75 | Due Today: 74 | Due This Week: 1

Fin Proj	Phase	My Role	Comment Due Date	Response Due Date	Comments Submitted
Testing cut & paste	FINAL	REVIEWER	6/7/2012	6/8/2012	4



Home Page

Electronic Review Comments

Home Submittal Assignments Reports Settings District Documents

Comments **Total: 51 | Due Today: 47 | Due This Week: 4**

Fin Proj	My Role	Comment Status	Assigned To	Comment Response Due Date
424613-1-32-01	REVIEWER	RESPONSE SUBMITTED	KURT LIEBLONG	6/4/2010 7/31/2010

2015 Design Training Expo

Home Page

Electronic Review Comments

Home Submittal Assignments Reports Settings District Documents

Action Items **Total: 2 | Due Today: 2 | Due This Week: 0**

Fin Proj	My Role	Comment Status	Comment Due Date	Response Due Date
424613-1-32-01	IN-HOUSE PROJECT MANAGER	COMMENT IN REVIEW	5/2/2015	6/2/2015
424613-1-32-01	IN-HOUSE PROJECT MANAGER	COMMENT NOT SUBMITTED	5/2/2015	6/2/2015

2015 Design Training Expo

ERC is all about the Submittal

Submittal Information

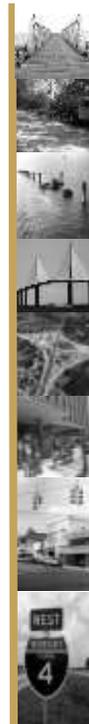
Financial Project Id 123456 - 1 - 52 - 01 Jobsite	Date Received 5/22/2014
Submittal Phase PHASE IV	Comment Due Date 6/22/2014
Staff Type IN-HOUSE STAFF	Response Due Date 7/22/2014
Submittal Type COMMUNITY AESTHETIC FEATURE	PM Comment Review Period 5 days
In-House Project Manager Luebke, Kurt (0972LK)	PM Response Review Period 5 days
Consultant Project Manager WOLFE, JAMES (J.M.D.WOLFE@DEP.STATE.FL.US) Clear	District CENTRAL OFF.
	Allow Unassigned Response <input type="checkbox"/>

Description 22 of 3500

This is a test project



Two halves of the Submittal

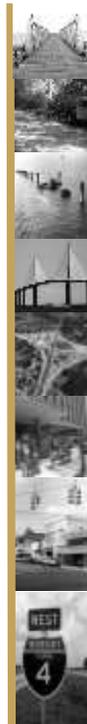


Two halves of the Submittal

- | | |
|--|--|
| <ul style="list-style-type: none"> • Reviewers (In House) <ul style="list-style-type: none"> • Make the comments • Submit the comments <ul style="list-style-type: none"> • To the Project Manager • Directly to the Design team • PM Accepts and closes | <ul style="list-style-type: none"> • Designers (Consultant) <ul style="list-style-type: none"> • Respond to comments • Submit them back <ul style="list-style-type: none"> • To the Consultant PM • To the Review team • PM Accepts and closes |
|--|--|



Back and Forth



Starting with the submittal

Assigned Submittals	Phase	By Role	Comment Due Date	Response Due Date	Comments Submitted
Go to Submittal for review	PHASE	MANAGER PROJECT MANAGER	6/18/2014	7/1/2014	0
Go to Submittal for review	PHASE	REVIEWER	6/18/2014	6/30/2014	4
Go to Submittal for review	PHASE	CONSULTANT PROJECT MANAGER	6/18/2014	6/30/2014	0

Click to go to the Submittal Screen



Looking a submittal

Submittal Information | Staff Assignments | Comments | Reports | Documents | Related Submittals

Financial Project ID: 1177078
 Financial Project Description: SR 29 FROM SR 82 TO HENDRY COUNTY LINE
 Submittal Phase: INITIAL
 Submittal Status: **OPEN** (indicated by an orange arrow)
 Staff Type: INHOUSE STAFF
 Submittal Type: SCOPE

Date Received: 5/8/2014
 Comment Due Date: 6/9/2014
 Response Due Date: 7/7/2014
 PM Comment Review Period: 0 days
 PM Response Review Period: 0 days
 Allow Unassigned Response:

Description: 926 of 3500
 Subject: Request for Stage I Scope of Services Review Comments & Man-hour Estimate
 You are requested to provide your Scope of Services Review Comments for the attached Stage I Scope of Services (Word document) for the subject project no later than 06/09/14. A Stage SR Review Meeting will be scheduled the week of 05/12/14 to review this project.
 You are requested to provide your Man-hour Estimates for the subject project no later than 07/31/14. Attached are the latest Man-hour Estimating forms

Save Delete



Create a New Comment



Create a New Comment



And you generate an email....

ERC EMAIL NOTICE:

Comments have been submitted by Kenneth Bass for your response for the following submittal:

Project FPID:

Project Name:

Submittal Phase: OTHER

Submittal Type: OTHER

Submittal Description: Test Project

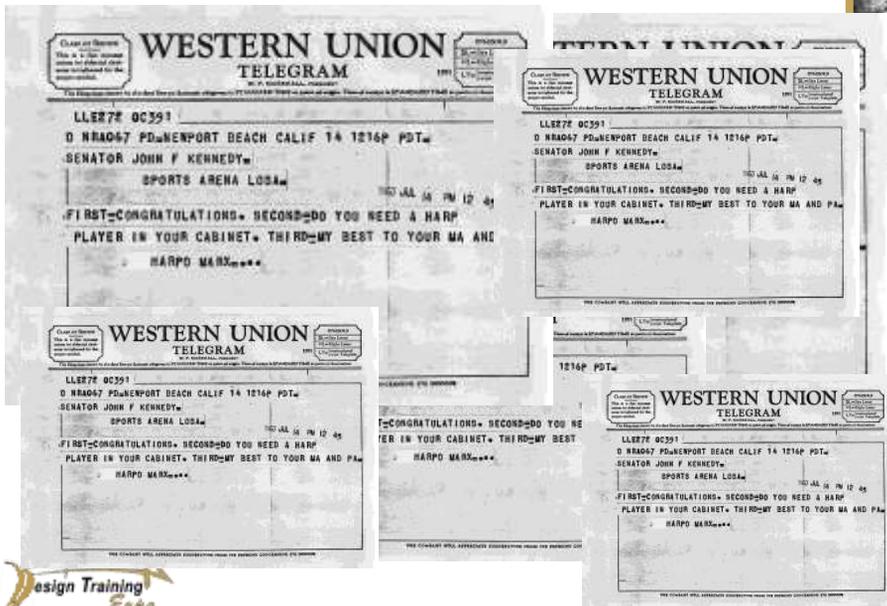
Comment Sequence: 1 [Link to the Comment in ERC](#)

The Response Due Date is currently 7/15/2014.

[Link to the Submittal in ERC](#)

If you have any questions or issues with this submittal, please contact the ERC In-house PM(s):
Gerlinde Masters at Gerlinde.Masters@dot.state.fl.us

This is an ERC application automatically generated email.
DO NOT REPLY TO SENDER.



HINT: Bundle your comments!



Save and Hold

Create/Edit a New Comment 133 of 3600

This is a test of the comment entering system to test whether a comment can be entered into the comment system. This is only a test.

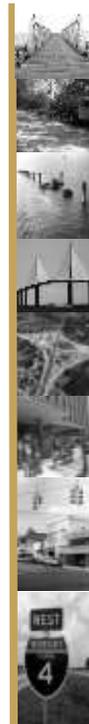
Comment:

Category:

- ADA
- ARCHITECTURE
- AVIATION
- BICYCLE/PEDESTRIAN
- BIDABILITY
- CONSTRUCTION
- CONTAMINATION**
- CULTURAL RESOURCES

(Press Ctrl to select multiple categories)

Reference:



How to cut down the email SPAM

Financial Project Id: 242626.1
 Financial Project Description: L75 FROM HERNANDO CO LINE TO SOUTH OF SR 44

Submit Information | Staff Assignments | Comments | Reports | Documents | Related Submittals

Mark as No Comment

[Create New Comment](#)

- Show comments assigned to me
- Show comments assigned to Andrew Young
- Show unresolved comments
- Show comments created by CHAD THOMPSON
- Show all comments
- Show comments by category

[Search Comments](#)

2. This is a test of the comment entry system to test whether a comment can be entered into the comment system. This is only a test.

Categories:	CONTAMINATION	Assigned To:	Sean Masters (LEAD REVIEWER)	Reference:	
Status:	COMMENT NOT SUBMITTED			Created By:	Sean Masters (REVIEWER)
				Created Date:	6/22/2014

3. This is a second test comment so that we can see the comments queued up. This is only a test.

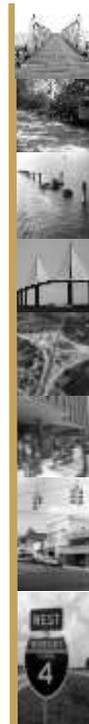
Categories:	DRAINAGE	Assigned To:	Sean Masters (LEAD REVIEWER)	Reference:	
Status:	COMMENT NOT SUBMITTED			Created By:	Sean Masters (REVIEWER)
				Created Date:	6/22/2014

[Delete](#) [Add Document](#)

[Submit All Comments](#) [Submit Selected Comments](#)



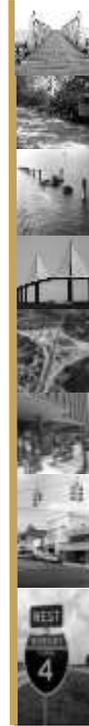
Happiness is spread by one less email at a time....



Common ERC Problems...



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Updating ISA information

<https://www3.dot.state.fl.us/internetsubscriberaccount/>

Internet Subscriber Account

My Account / My Services

Email Address: KLEBLONG8@EMBARQMAIL.COM

First Name: KURT

Last Name: LIEBLONG

Company Name: FDOT

Phone Number: (850) 414-4787

Status: ACTIVE ACCOUNT

Challenge Question: WHAT IS YOUR MOTHER'S MADDEN NAME?

Challenge Answer:

[Change Email Address](#)

DO NOT REPLY TO SENDER.



Password Security

I'm not giving
you my passwords.

WHY DON'T
YOU LOVE ME?!



Set up a Delegate!

Home	Submittal	Assignments	Reports	Settings	District
Action Items				User Settings	
Comments				Assign Roles	
Assigned Submittals				District Settings	
				Assign Roles	
				Manage User	
				Transfer User Assignments	
				Send Notification	



Set up a Delegate!

User: sp965sm | Role: STATE ADMIN | District: CENTRALO

Home

Submittal

Assignments

Reports

Manage User

Enter User: [Clear](#)



Set up a Delegate

Home Submittal Assignments Reports

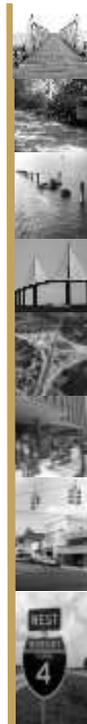
Manage User

Enter User: [Clear](#)

Name: Hollyjane Aldridge
 Email: hollyjane.aldrige@dot.state.il.us
 Contact No: (850) 414-4164
 District: CO

Manage User Delegates:
 No Delegate Found!

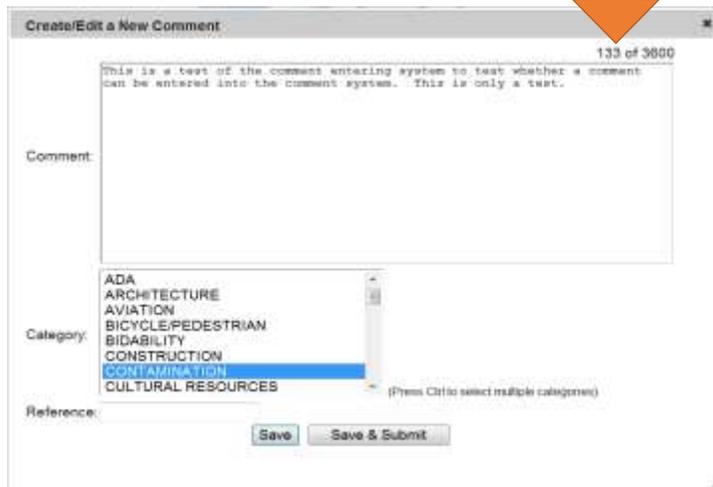
Add Delegate - Select Staff Member delegate:



Set up a Delegate



Remember This?



Create/Edit a New Comment 133 of 3600

This is a test of the comment entering system to test whether a comment can be entered into the comment system. This is only a test.

Comment:

Category:

- ADA
- ARCHITECTURE
- AVIATION
- BICYCLE/PEDESTRIAN
- BIDABILITY
- CONSTRUCTION
- CONTRIBUTION
- CULTURAL RESOURCES

 (Press Ctrl to select multiple categories)

Reference:

Save Save & Submit



Internet Explorer Compatibility...

- Internet Explorer Compatibility

<http://windows.Microsoft.com/en-us/internet-explorer/use-compatibility-view#ie=ie-9>

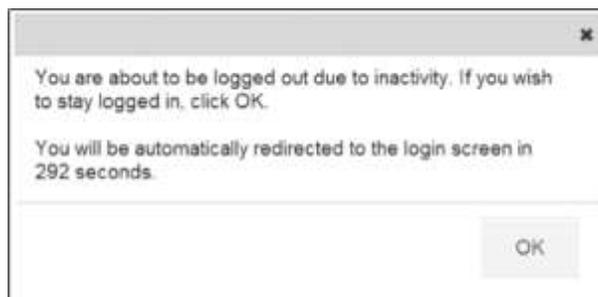


- Firefox and Google Chrome are not typically affected.



System Timeout

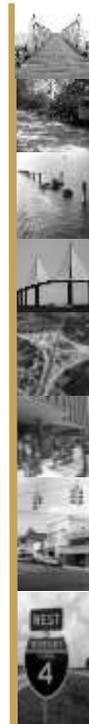
- System Time Out
 - After 30 minutes of inactivity in ERC
 - Makes ERC faster!



Just “Too Much Going On” with a Comment...



**SO...
WHAT ABOUT DESIGN-BUILD?**



Design-Build Bulletin (March 2013)

- DB Phase Review Bulletin
 - Comments which **do** and **do not** refer to Contract violations
 - Comments related to Contract Violation
 - Cite Contract Violation
 - Indicate that a Response **is** Required
 - Comments not related to Contract Violation
 - Indicate that the comment is provided **"For Information Only"**
 - Indicate that a Response **is not** Required
- Found at the Design Website
<http://www.dot.state.fl.us/rddesign/bulletin/Default.shtm>



Requests for upgrades to ERC

- Three Business Cases are being consideration by OIS for ERC upgrades
 - Design Build
 - System Administration
 - User Improvements

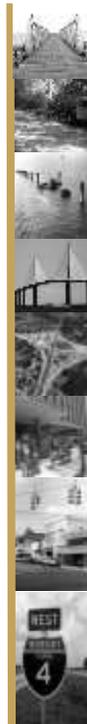


Wrapping it all up...



What we talked about today

- Benefits of ERC
- Successes
- Basic Workflow
- Account types
- Common User Problems





SUCCESS
Because you too can own this face of pure accomplishment

http://www.4mat.com

NEST
PROJECT
4