Florida Department of
TRANSPORTATION

Materials Acceptance and Certification (MAC) Company Profile Management

August 1, 2015

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Introduction

What is a Company Profile?

The Company Profile in MAC is the way the system ties together the different parts of MAC to a specific company. Here is the data that MAC ties to a company profile:

- Users (all companies have users)
- Facilities
    - Laboratories – not all companies will have laboratories
    - Production Facilities – not all companies have production facilities
- Mix Designs – not all companies will have mix designs

A specific company will have data for each area depending on the functions of the company and the entries in the other MAC tables. For example, a consultant firm may only have users; a producer may have users, production facilities and mix designs; a prime contractor may have users, facilities, labs and mix designs.

Who is the Company Profile Manager?

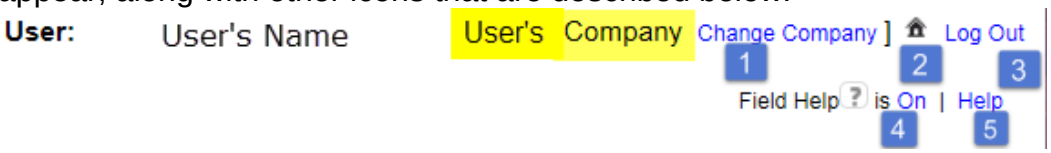
This is the person who maintains the company profile. The Company Profile Manager can revise user roles for existing users in the company. The Company Profile Manager can grant access to his company's data to another company and acknowledge that his company has been granted access to another company’s data.

This document will describe the Company Profile Manager's functions in MAC.

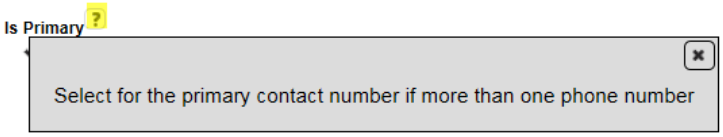
Chapter 1 – MAC Navigation

Here are some basic navigation tips for MAC.
NOTE: Because MAC is a web based program, the screen layout may be slightly different due to screen resolution and zoom. The zoom in the examples in this document is set very high to display the appropriate fields for each example. Your screen layout may be different; however, all fields should display. If you do not see all the fields, adjust your zoom or use the scroll bar until they become visible.

After login, in the top right corner of the screen, your name and Company Name will appear, along with other icons that are described below.



1. If you are a user assigned to more than one company, use the change company option to switch from one company to another. Your access for each company will depend on your role for that company. While you are logged in under a specific company, all actions will be associated to your user account and that company.
2. The Home icon will take you back to the home screen on any page in MAC.
3. Log Out option will log you out of MAC and back to the home page.
4. Field Help is On/Off – there are entries on fields in MAC known as Field Help. They are represented by a question mark in a box icon. Not all fields have Field Help.

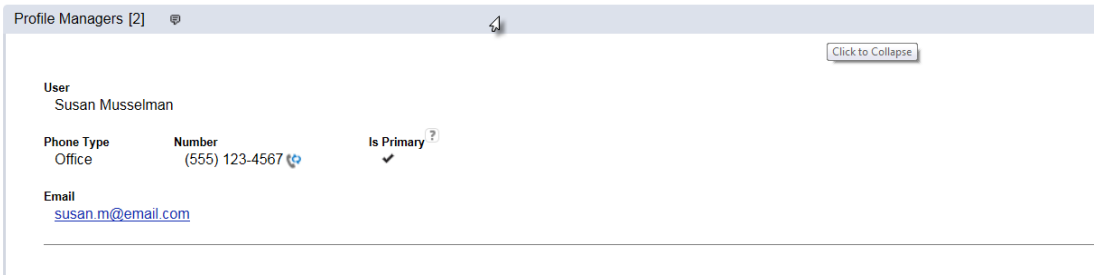


By clicking on the On/Off toggle in #4, you can turn the Field Help on or off.
5. The Help option takes you to the State Materials Office website where you can find general assistance and additional information on specific MAC topics.

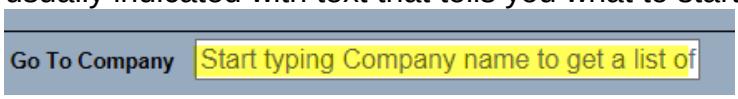
MAC screens are tab based. Each screen is subdivided into subject areas that are located under the tabs. The data under the tab may not be visible if the tab is collapsed.

1. To view data under a collapsed tab, click on the tab to expand it.

2. To hide data and see more of the screen, click on an expanded tab to collapse it.

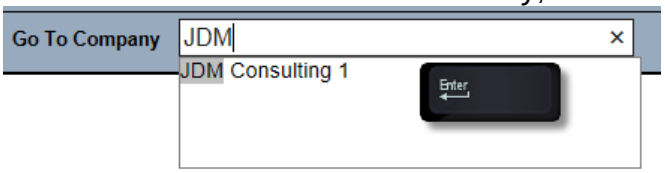


Searchable fields in MAC work on the wild card character process. These fields are usually indicated with text that tells you what to start typing.



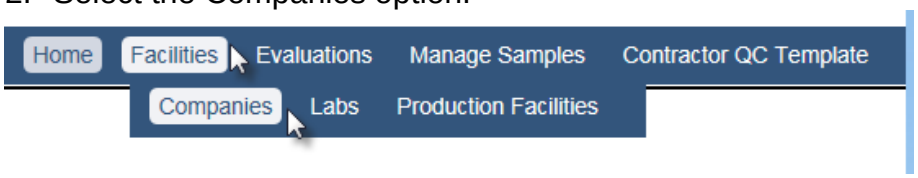
At least 3 characters are needed to begin the search. It can be any 3 characters in the entry since the search is a "contains" search. After 3 characters have been entered, MAC will search for all existing entries that contain those characters. The more characters you provide, the shorter the list. Select the desired entry by clicking on it to populate the field.

NOTE: If the search returns one entry, use the enter key to populate the field.

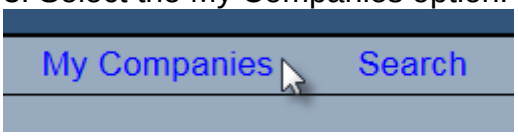


Chapter 2 – Navigating to a Company Profile using the My Companies Option

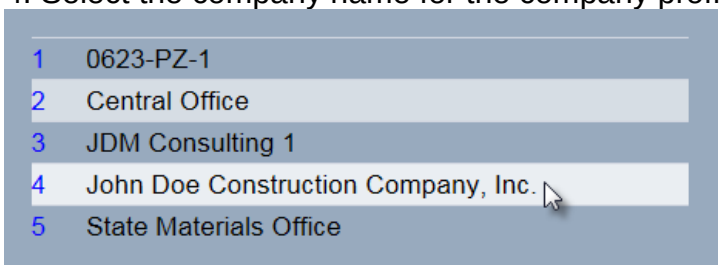
1. In MAC, select the Facilities option.
2. Select the Companies option.



3. Select the My Companies option.



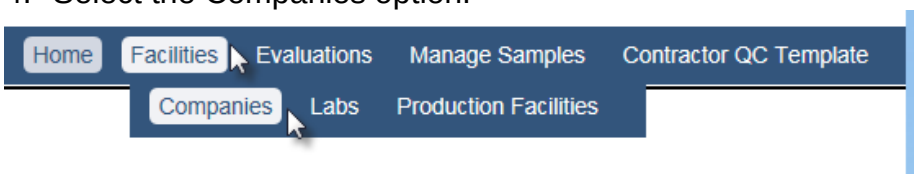
A list of companies where you are assigned as a user will appear.
4. Select the company name for the company profile you want to navigate to.



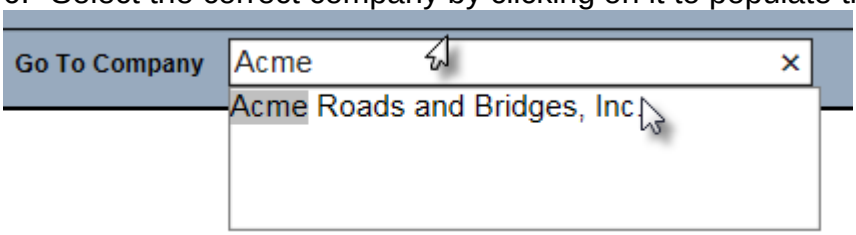
The Company Profile screen will appear with tabs for Profile Managers, Users, Locations, Facilities, Access Granted By This Company and Accss Granted To This Company, Documents and Comments. All profiles will have these standard tabs, but not all companies will have data under each tab.

Chapter 3 – Searching for an Existing Company Profile using the Go To Company Field

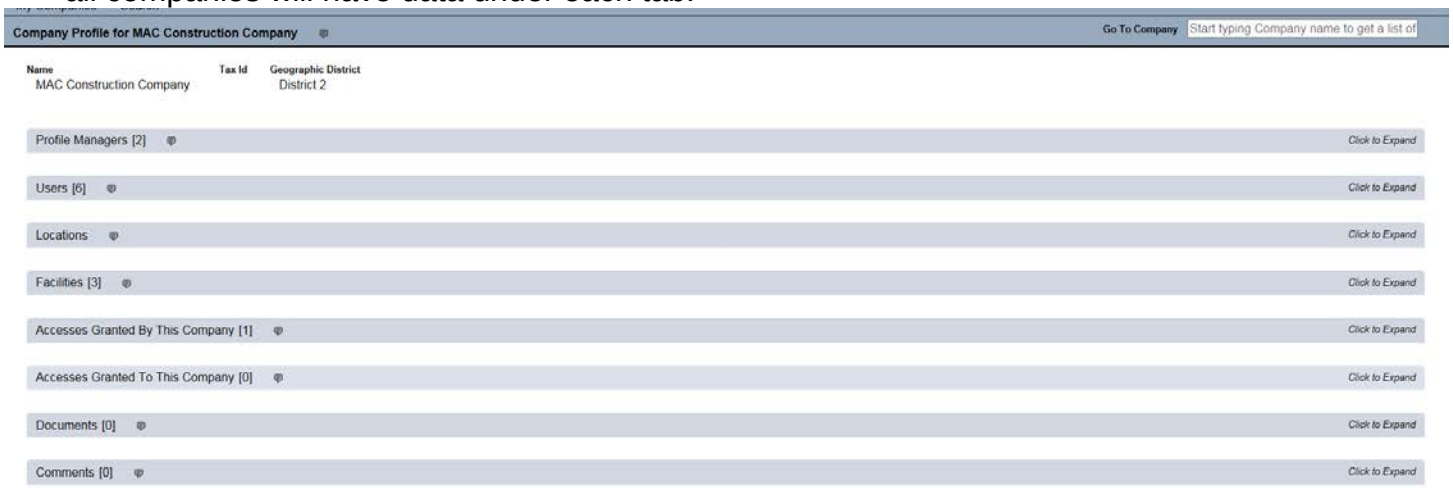
3. In MAC, select the Facilities option.
4. Select the Companies option.



5. In the Go To Company field, search for the appropriate company name.
6. Select the correct company by clicking on it to populate the Go To Company field.



The Company Profile screen will appear with tabs for Profile Managers, Users, Locations, Facilities, Access Granted By This Company and Accss Granted To This Company, Documents and Comments. All profiles will have these standard tabs, but not all companies will have data under each tab.



Chapter 4 – Adding, Revising or Deleting Company Profile Managers

The Company Profile Manager can designate additional Company Profile Managers from the existing pool of users assigned as Project Managers. To assign additional users at Profile Managers see **Chapter 5 – Revising User Roles**

A. Updating an Existing Company Profile Manager

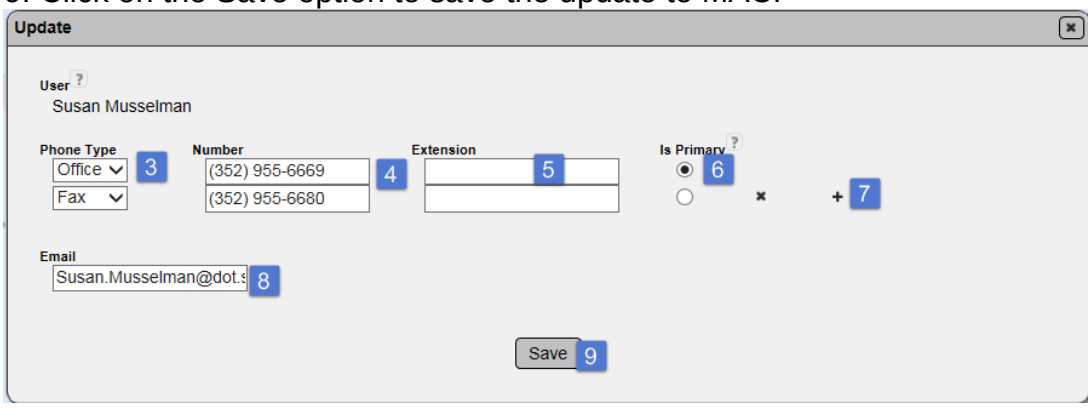
1. Click on the Profile Manager(s) tab.
2. To update an existing Company Profile Manager's information, click on the Update option.

NOTE: A ★ indicates a required field.

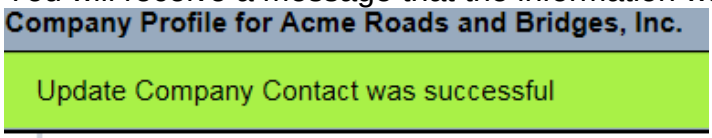
3. If Phone type is incorrect, revise it by clicking on the drop down arrow in the field.
4. If the Number is incorrect, revise it.
5. Add or revise the extension, if needed.
6. If more than one number is provided, the Is Primary phone number designator may be changed to designate which of the numbers provided is the primary number.
7. If additional phone numbers need to be added, click on the + sign to receive another set of fields for a new number. Complete the fields as described.
8. If the email address is incorrect, revise it. This information is used by MAC to send notifications to the Company Profile Manager. If it is incorrect, the Company Profile Manager may not receive MAC notifications related to the company profile information.
9. When all the information is corrected, click on the Save option to save the changes to MAC.

3. **Phone Type** – provide the phone type for the first phone number listed for the contact person; office, cell or fax.
When you select the phone type, additional fields will appear for the phone number.
4. **Number** – provide the full phone number including area code. MAC will format the numbers to (XXX) XXX-XXXX.
5. **Extension** – provide the extension if applicable.
6. **Is Primary** – If more than one number is provided, the Is Primary phone number designator may be changed to designate which of the numbers provided is the primary number.

7. **+** – If additional numbers are provided, click on the plus sign (+) to add more rows. Repeat the steps to assign more phone numbers if given.
8. **EmailAddress** – Enter the email address provided for the contact person.
9. Click on the Save option to save the update to MAC.



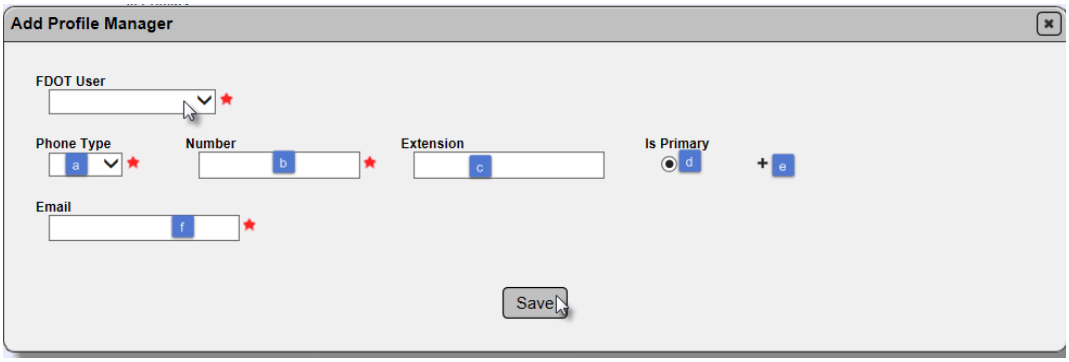
You will receive a message that the information was updated successfully.



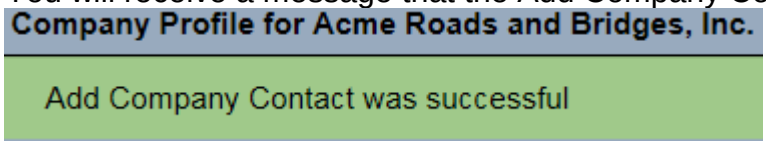
B. Adding a Company Profile Manager

1. Click on the Add Profile Manager option to add Company Profile Manager(s).

2. Select the appropriate person from the drop down list. This list is compiled from the existing users assigned the role of Profle Manager See **Chapter 6 – Facility Profile Managers**.
3. Enter the following:
a. **Phone Type** – provide the phone type for the first phone number listed for the contact person; office, cell or fax.
When you select the phone type, additional fields will appear for the phone number.
b. **Number** – provide the full phone number including area code. MAC will format the numbers to (XXX) XXX-XXXX.
c. **Extension** – provide the extension if applicable.
d. **Is Primary** – If more than one number is provided, the Is Primary phone number designator may be changed to designate which of the numbers provided is the primary number.
e. **+** – If additional numbers are provided, click on the plus sign (+) to add more rows. Repeat the steps to assign more phone numbers if given.
f. **EmailAddress** – Enter the email address provided for the contact person.
4. Click on the Save option to add the user as a Company Profile Manager.



You will receive a message that the Add Company Contact was successful.



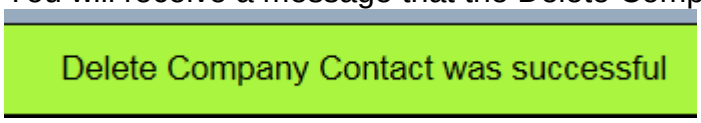
C. Removing a Company Profile Manager

1. Click on the Remove option to remove a Company Profile Manager. This action removes the user from the Company Profile and removes his ability to revise the Company Profile data.

A dialog box will appear prompting you to remove the user.

2. Click on the Remove option to complete the action.

You will receive a message that the Delete Company Contact was successful.



Chapter 5 – Revising User Roles

The Company Profile Manager can revise existing users' roles for any company role. A user can hold more than one role. It is up to the company to determine which roles are assigned to existing users.

A. Updating Existing User Roles

1. Click on the User tab.

The Users with roles currently assigned will appear.

Users [6]

User	Data Entry User	Data Reviewer	Facility Profile Manager	Mix Design Reviewer		
Deibbys Rodriguez	✔				Update	Remove User from Company
Hla Hla Middleton	✔	✔			Update	Remove User from Company
Mendy Bell			✔		Update	Remove User from Company
Paul Passe			✔		Update	Remove User from Company
Robert Bryant			✔		Update	Remove User from Company
Susan Musselman			✔		Update	Remove User from Company

Showing 1 to 6 of 6

The company roles are as follows:

a. Data Entry User – this user can create samples at sample login, receive samples (if applicable); and enter test results.

b. Data Reviewer – this user can perform all the functions of a Data Entry User plus submit samples to the FDOT for finalization. Many companies prefer to have this assigned to a user with some familiarity with the data, acceptance requirements and other related items, like a Laboratory Manager or a QC Manager.

NOTE: Companies can opt to split the Data Entry User and Data Reviewer roles and assign to different users or they may assign Data Reviewer to all users.

c. Facility Profile Manager – this user is designated in MAC as the person responsible for maintaining the contact information for a company and/or facility profile in MAC.

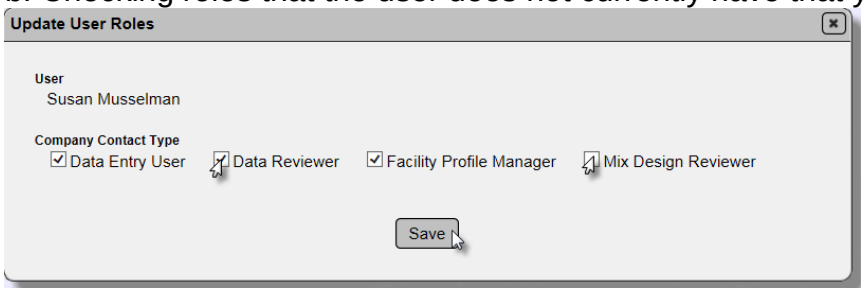
d. Mix Design Reviewer – this user can review any existing concrete and/or asphalt mix designs associated to a company profile.

Note: For proposed mix designs that need to be reviewed and approved by FDOT, the Mix Design Submitter system role was created. It is not a company role. That is because most mix designs are developed by specialists working for another company besides the company that the mix design will be assigned to when it is approved. **If your company has mix designs developed by in-house mix designers and not a consultant, ensure the personnel entering the new mix design data for the designer request the sytem role Mix Design Submitter for new mix designs and assign the company role Mix Design Reviewer to manage existing mix designs.**

2. Select the Update option to revise the existing roles for a specific user.

User	Data Entry User	Data Reviewer	Facility Profile Manager	Mix Design Reviewer	
David Davis	✔	✔	✔	✔	Update
Lani Nash	✔				Update
Susan Musselman	✔	✔	✔		Update

3. Revise existing roles by:
a. Unchecking roles the user no longer is to hold.
b. Checking roles that the user does not currently have that you want to add.

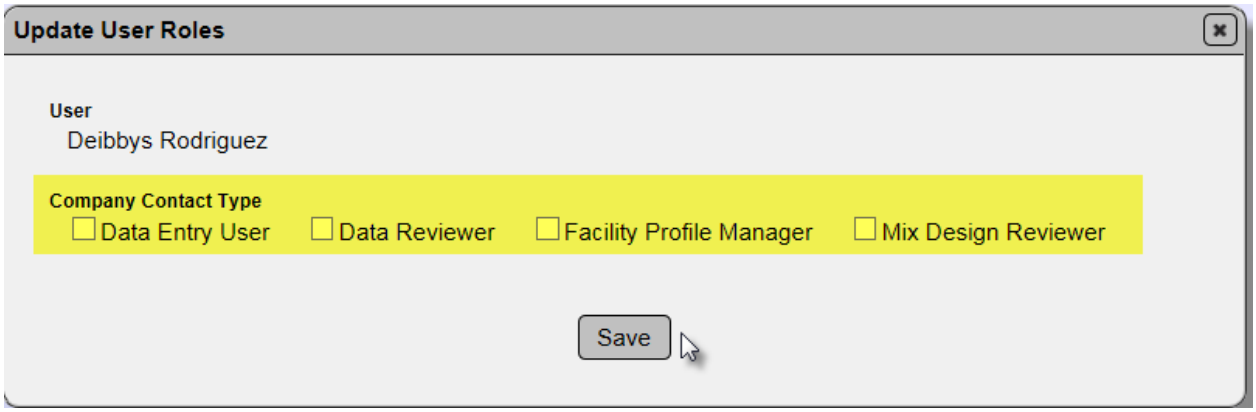


4. Click on the Save option to save the changes to the user's roles.
You will receive a message that the update was sucessful.

Update User Roles was successful

B. Removing all Roles for an Existing User

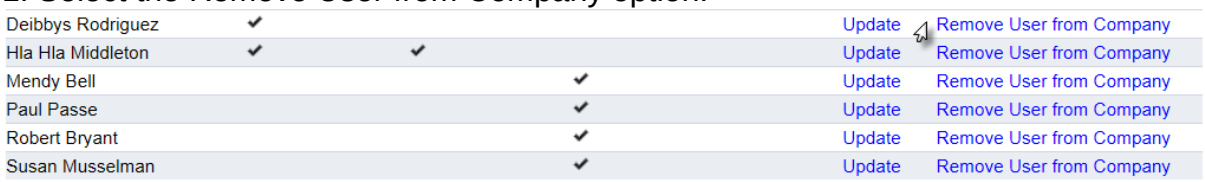
The Company Profile Manager can remove all roles for an existing user by deselecting all the roles associated to the user. This does not remove the user from the list of potential users for the company, but does terminate to user's ability to act upon company data. This action might be taken when an employee is promoted and no longer needs access to MAC, but may need to be given access again sometime in the future.



C. Removing a User from the Company Profile List

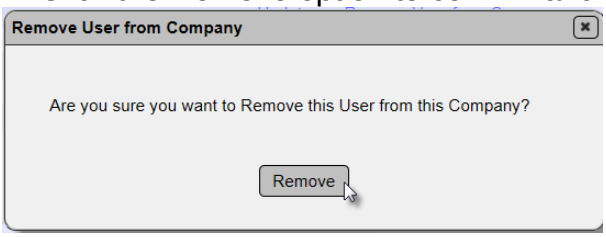
The Company Profile Manager can remove a user completely from the company's list of users. This action might be taken when a user leaves employment with the company and should no longer have access to the company's data. The difference between this action and removing access by unassigning roles (Section B above) is that this user will be removed from the list of employees so no future access can be given without the intervention of a DAC or System Administrator.

1. Select the Remove User from Company option.

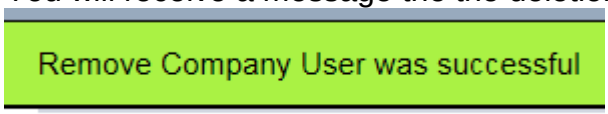


A dialog box will appear confirming that you want to remove the user.

2. Click the Remove option to confirm and complete the action.



You will receive a message the the deletion was successful.



Chapter 6 – Facility Profile Managers

The Company Profile Manager can designate the users who can update Production Facility and Laboratory Profiles on behalf of the company. Because these roles are also designated in conjunction with facilities, it has additional considerations in managing user roles.

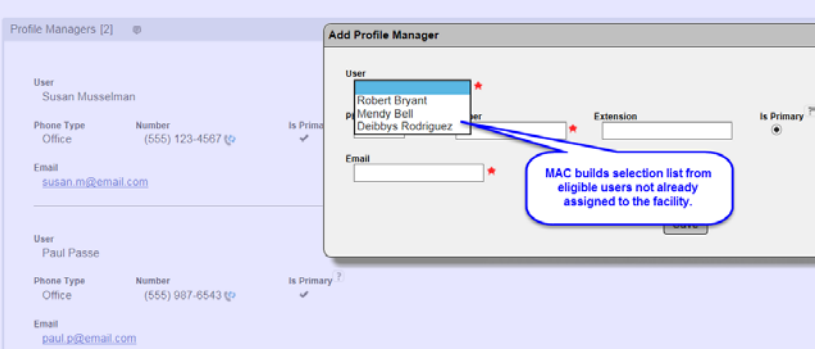
A. Potential Profile Managers

Any user listed in the Users tab that have been assigned the Profile Manager role is eligible to be a Company Profile Manager or a Facility Profile Manager. MAC creates the selection for these functions from the users who are designated to be eligible to be a Profile Manager.

5 of 6 users eligible to be a Profile Manager.

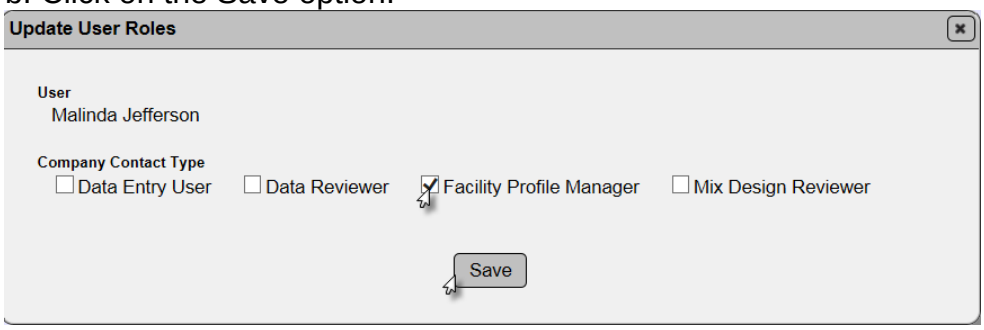
Users [6]

User	Data Entry User	Data Reviewer	Facility Profile Manager	Mix Design Reviewer
Deibbys Rodriguez			✔	
Hla Hla Middleton	✔	✔		
Mendy Bell			✔	
Paul Passe			✔	
Robert Bryant			✔	
Susan Musselman			✔	

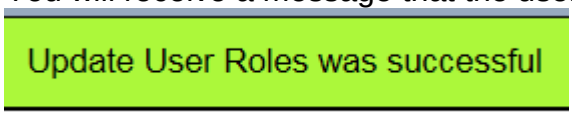


B. Deleting an Existing Facility Profile Manager

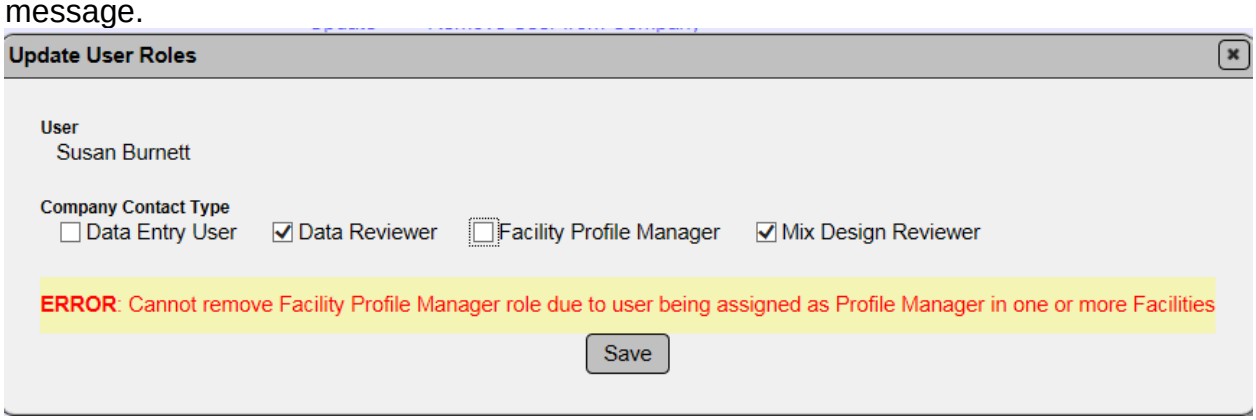
1. If you attempt to delete this role from a user who is not assigned as a profile manager to a facility profile, the system will allow you to do so.
a. Unselect the user role.
b. Click on the Save option.



You will receive a message that the user role was updated successfully.



2. If you attempt to delete this role from a user who is assigned as a profile manager to a facility, the system will not allow you to continue and you will receive this error message.

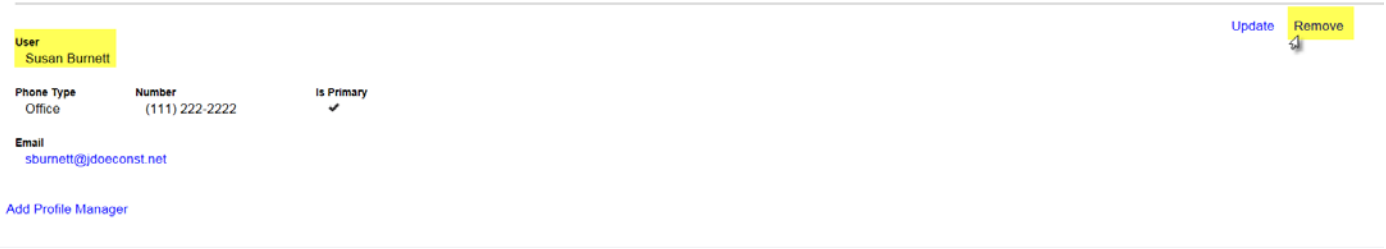


This error is because this user is assigned as either a compnay profile manager, a facility profile or both.

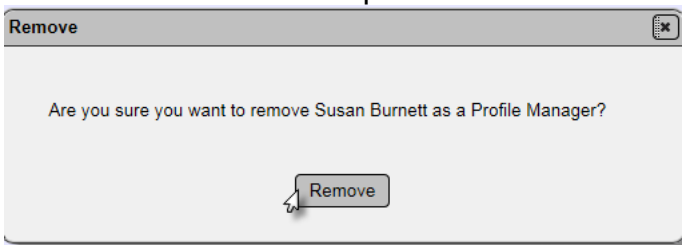
In order to unassign the role, you first must remove the facility assignments from the user.

3. Check the company profile tab to see if the user is assigned as a company profile manager.

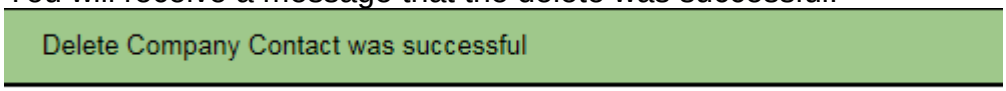
a. If the user is listed as a company profile manager, select remove to unassign them from the company profile.



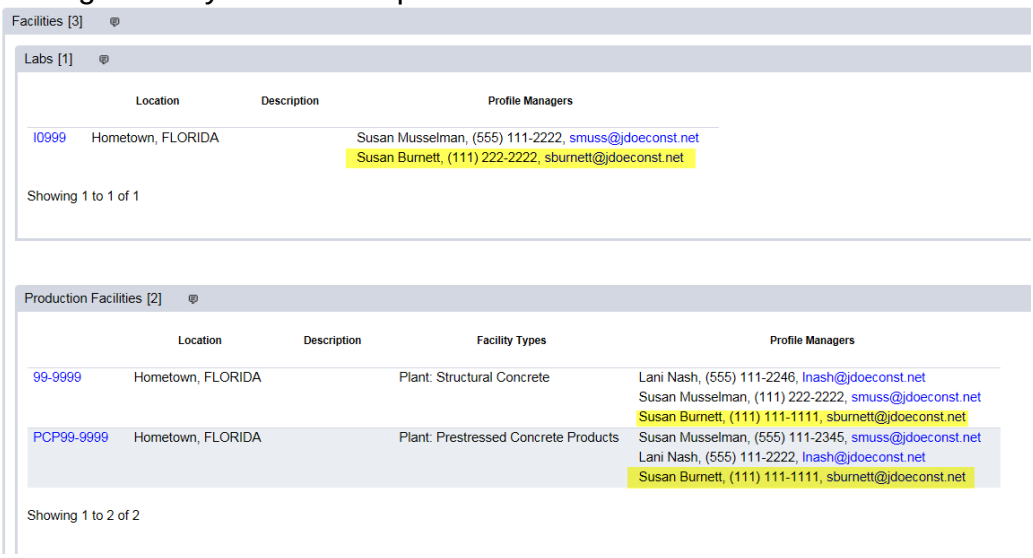
b. Select Remove to complete the action.



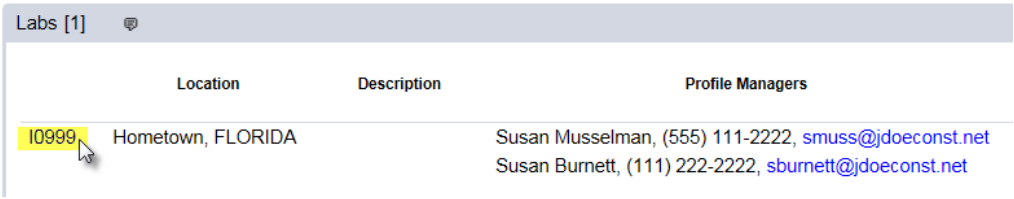
You will receive a message that the delete was successful.



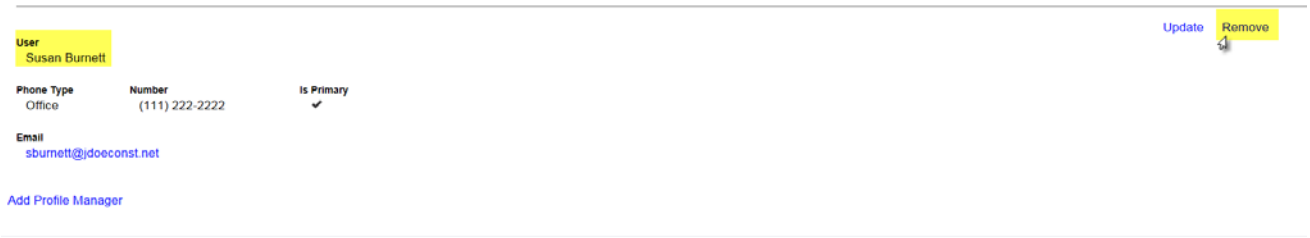
4. Check the facilities tab to determine if the user is assigned as a faciltiy profile manager to any labs and/or production facilities.



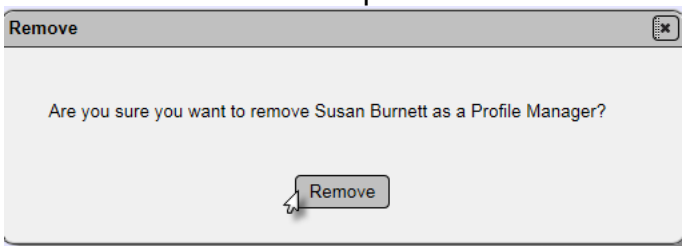
5. To navigate to each profile, click on the blue facility identifier.



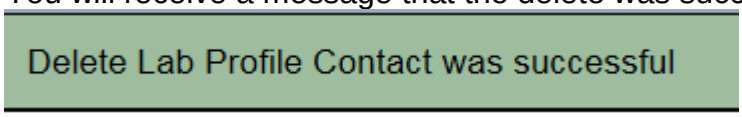
6. Select the profile manager tab on the facility profile.
a. Select the remove option for the user.



b. Select Remove to complete the action.

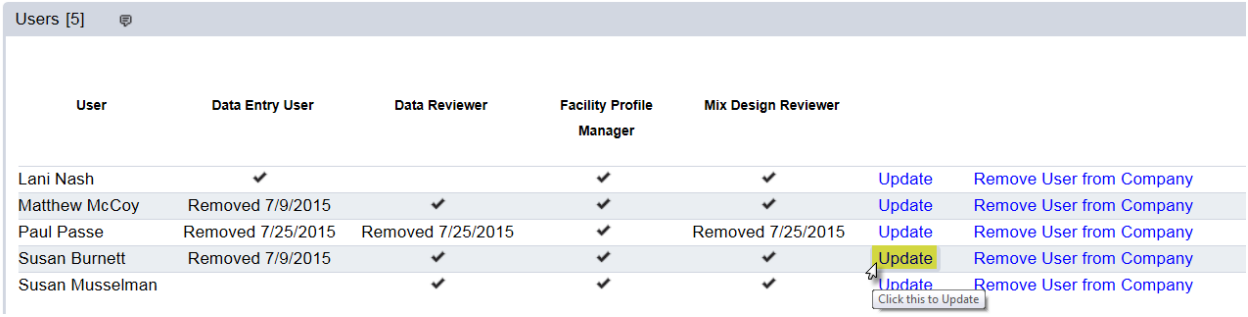


You will receive a message that the delete was successful.

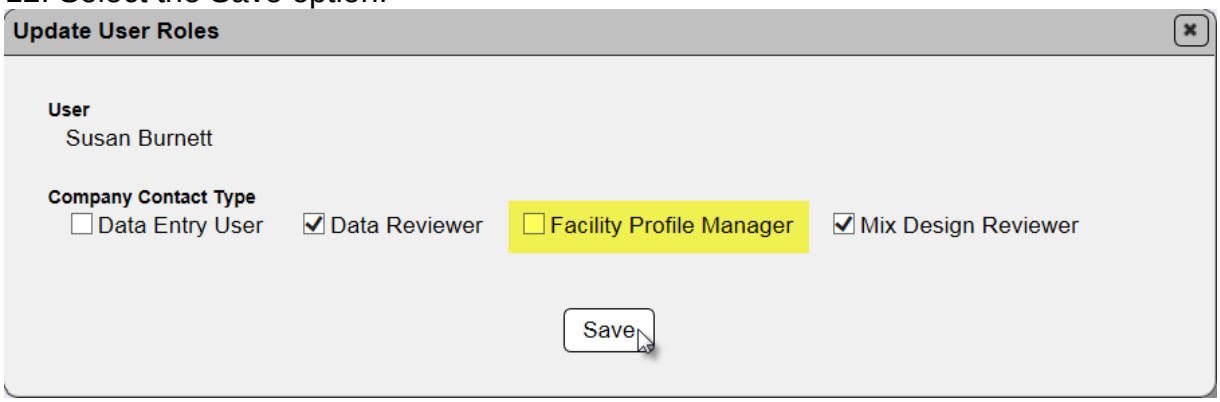


7. Navigate back to the company profile to continue the process by clicking on the blue company name at the top of the facility profile page.

8. Repeat the process for each facility the user is assigned as profile manager. When all assignments are removed, the user can be unassigned the role of Facility Profile Manager under the user tab successfully.
9. Select the Users tab.
10. Select the Update option next to the appropriate user.



11. Unselect the Facility Profile Manager Role.
12. Select the Save option.



You will see that the role was removed from the user.

User	Data Entry User	Data Reviewer	Facility Profile Manager	Mix Design Reviewer		
Lani Nash	✔		✔	✔	Update	Remove User from Company
Matthew McCoy	Removed 7/9/2015	✔	✔	✔	Update	Remove User from Company
Paul Passe	Removed 7/25/2015	Removed 7/25/2015	✔	Removed 7/25/2015	Update	Remove User from Company
Susan Burnett	Removed 7/9/2015	✔	Removed 8/3/2015	✔	Update	Remove User from Company
Susan Musselman		✔	✔	✔	Update	Remove User from Company

You will receive a message the update was successful.

Update User Roles was successful

Chapter 7 – Company Location Information

In MAC, each company has location information related to the company's corporate or regional headquarters. This information is used to assist MAC users with identifying individual companies such as companies with similar sounding names. This information is not published or reported and is intended for internal MAC use only.

A. Updating Company Location Information

1. Click on the Locations tab.
2. To change the physical address, click on the update option.

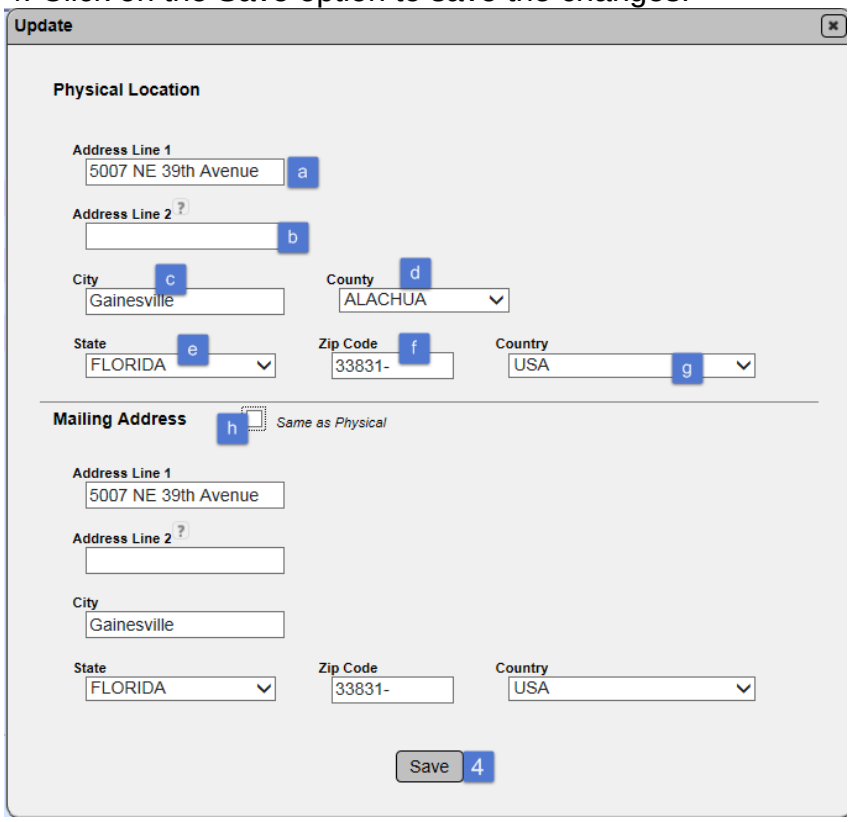
An update dialog box will appear.

3. Revise the existing data.

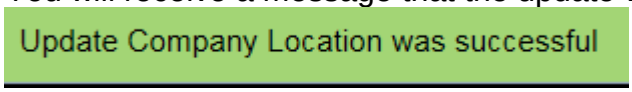
a. Address Line 1 – Enter the full address.
b. Address Line 2 – Use this field if additional address line information is needed; for example Suite Number or Box Number.
c. City – Enter the City.
d. County – if the City is in Florida, select the county where the office is located. If the City is not in Florida, the field will default to OUT OF STATE.
e. State - Select the State from the drop down list.
f. Zip Code - enter the zip code.
g. Country – this defaults to USA. Do not revise unless the company corporate or regional headquarters is not located in the United States.
h. Mailing Address – If the mailing address and the physical address are the same, select this checkbox, if it is not already selected. If it is selected and the mailing address is different from the physical address, deselect it and proceed to the next section to revise the mailing address.

To change the mailing address, follow the same steps as described for the Physical Address section.

4. Click on the Save option to save the changes.



You will receive a message that the update was successful.



Chapter 8 – Company Facilities

A. Reviewing Facilities Assigned to a Company Profile

To see the facilities assigned to a company profile:

1. Click on the Facilities tab.

The information will appear and is divided into the Labs and Production Facilities assigned to the company.

NOTE: Not all companies will have laboratories and/or production facilities assigned to the company profile.

Labs [3]

	Location	Description
I0002	Jacksonville, FLORIDA	David Test
Z0199	Hometown, FLORIDA	
Z0299	Mytown, FLORIDA	

Showing 1 to 3 of 3

Production Facilities [3]

	Location	Description
Z1999	Hometown, FLORIDA	Mine: Aggregate
Z2999	Mytown, FLORIDA	Plant: Asphalt
Z39999	Mytown, FLORIDA	Plant: Structural Concrete

Showing 1 to 3 of 3

2. To navigate to a specific laboratory or production facility profile, click on the facility id.

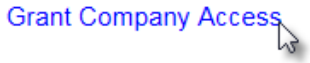
Company Profile Managers, as well as the Facility Profile Managers, have the ability to update production facility and laboratory profiles. The specific facility profile information cannot be revised from the company profile. The purpose of this section is to allow the Company Profile Manager to navigate to those entries to review and revise as needed.

Chapter 9 – Granting Other Company Access

MAC access is based on the company profile. Because some companies have contractural relationships with another company, they need to share access to their company's data with the other company. This is done by granting access to the company. This means the other company has your company's permission to act upon data on behalf of your company. Most information is viewable in MAC, with the exception of proprietary information like mix designs or certain Producer Quality Control Plans. Most other data can be viewed by any user and some information that is deemed public information can be viewed by people who don't have access to MAC. When your company grants access to your data, it is not for the purpose of viewing it unless it's for proprietary data. It is for the purpose of acting on the data, such as performing data entry, data review or mix design review.

A. Granting another Company Access

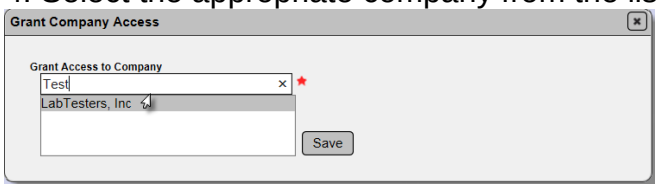
1. Click on the Access Granted by this Company tab.
2. Select the Grant Company Access option.



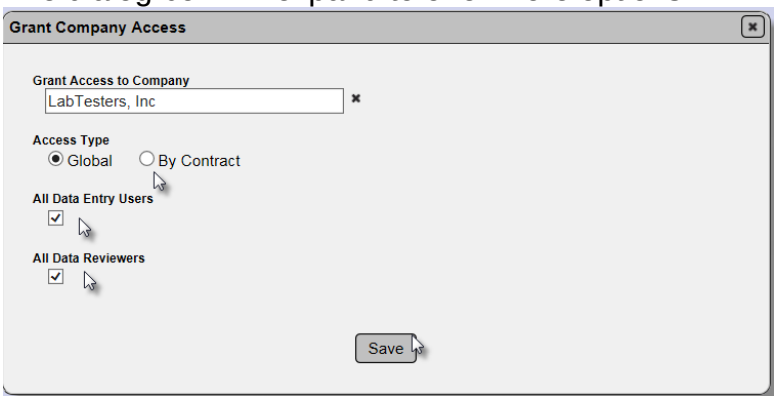
NOTE: In order to grant access to another company, that company must have a company profile with users in MAC.

A Grant Company Access dialog box will appear.

3. Search for the appropriate company using the search characters.
4. Select the appropriate company from the list.

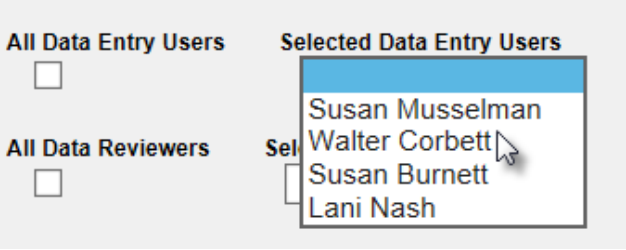


The dialog box will expand to offer more options.

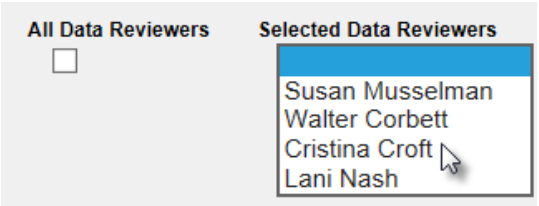


MAC allows for the company access to be global or by contract id.
5. If your company wishes to grant global access to the other company, select the Global Access Type. This is typically for companies that have long term contracts with other companies providing data entry services without regard to any FDOT contract.
6. If your company wishes to restrict the other company's access to a specific contract or contracts, select the By Contract Access Type.
7. Type in the Contract Id for the contract you wish to grant access to.

8. If addtional contracts are needed, repeat steps 6 and 7.
NOTE: This separate selection for each contract is intentional so that if the access needs to be deleted at a later date, it can be done on a case by case basis. **See D. Removing Access Granted to another Company** for additional information.
Access can be allowed for all users in the company or can be restricted to certain users. For example, your company has a contract with another company for a specific person to perform engineering analysis or data entry. The contract dictates that this person is the one who will perform the data entry so you don't want to grant access to anyone else but the person in the contract.
9. To grant access to all data entry users, leave the All Data Entry Users indicator checked.
10. To grant access to specific data entry users, unselect the All Data Entry Users indicator.
A new field will appear in the dialog box listing all of the users on that company's profile who have been granted Data Entry User access.
11. Select the user from the list.
12. If additional users are needed, continue to select users until all users are indicated.



13. To grant access to all data reviewers, leave the All Data Reviews Users indicator checked.
14. To grant access to specific data reviewer users, unselect the All Data Reviewers indicator.
15. Select the user from the list.
16. If If additional users are needed, continue to select users until all users are indicated.



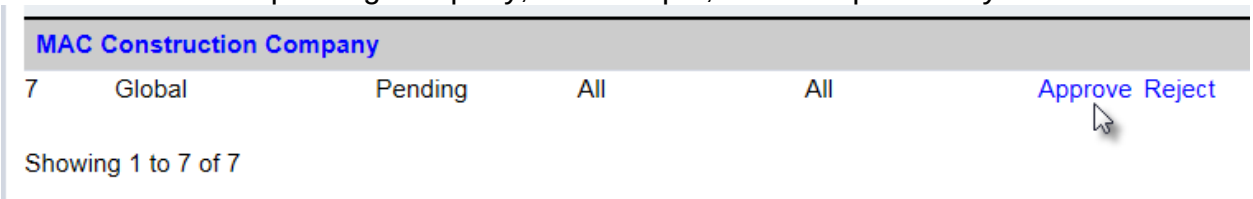
17. Click on the Save option to save the Grant Company Access options.
You will receive a message that the update was successful.

Update Company Access was successful

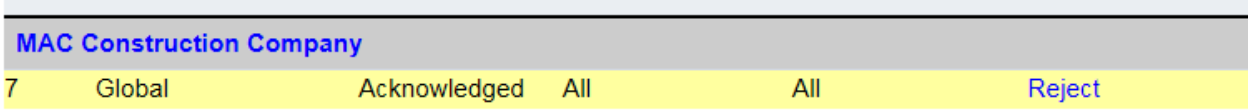
B. Acknowledging Access Granted to your Company

The granting of access is a two-step process. The first step is the company granting access must request the action by the Grant Access to Another Company function (as described in Section A of this chapter). The second step is for the company receiving access to acknowledge the granted access. This is done so that both companies have the opportunity to verify the access is appropriate before the system allows it to occur. If your company has been granted access by another company, you can review the request and acknowledge or reject it as appropriate.

1. Click on the Accesses Granted to this Company tab.
Any new requests will appear in a Pending status.
2. Approve the request if valid. Reject the request if your company should not be acting on behalf of the requesting company, for example, it was requested by mistake.

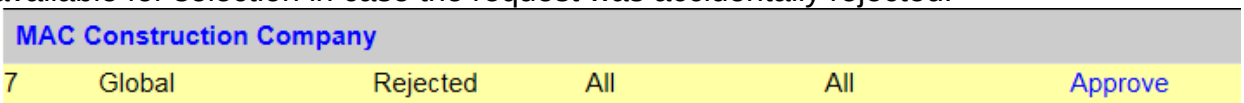


If Approve was selected, the status will show as Acknowledged. Your company will have the abilities requested by the granting company in the request.



Approve Company Access was successful

If Reject was selected, the status will show as Rejected. Your company will not have the ability to act on behalf of the requesting company. The Approve option remains available for selection in case the request was accidentally rejected.

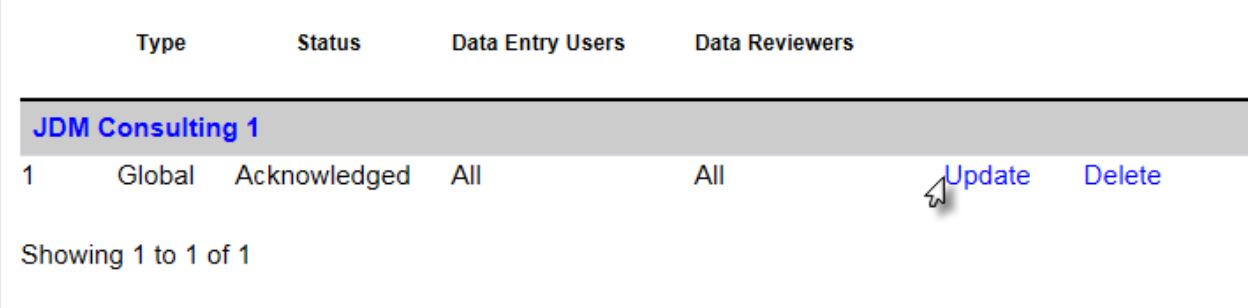


Reject Company Access was successful

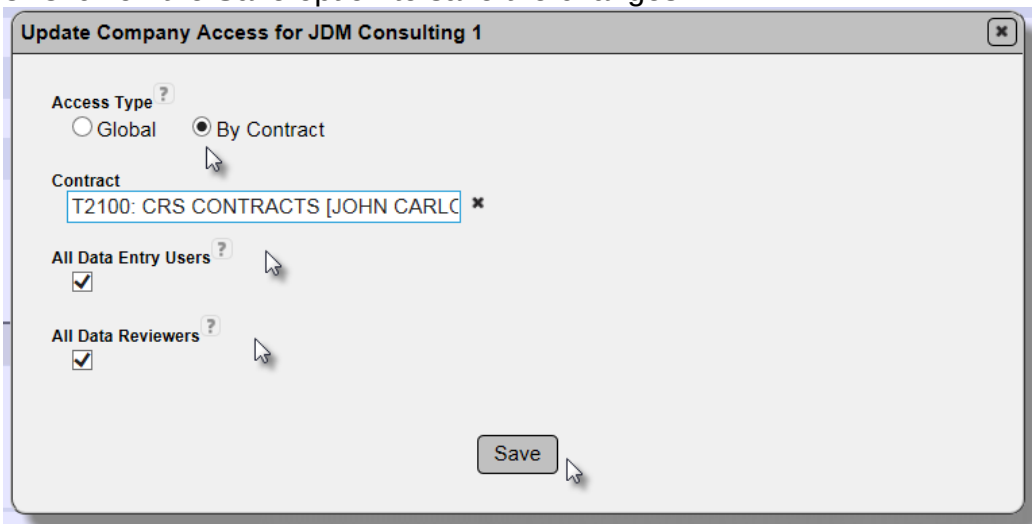
C. Updating Existing Granted Access to another Company

During the life of an granted access, you may want remove the request that was previously granted.

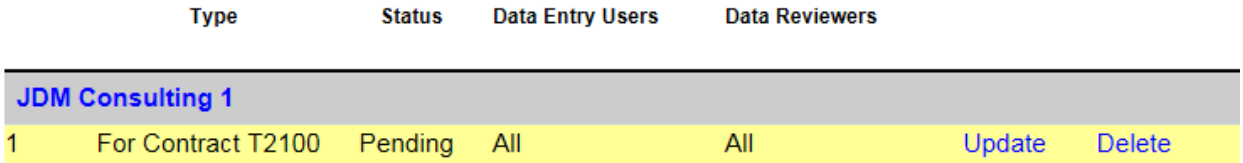
1. Select the Update option to revise an existing request.



2. Make the changes to the existing data as described in Section A above.
3. Click on the Save option to save the changes



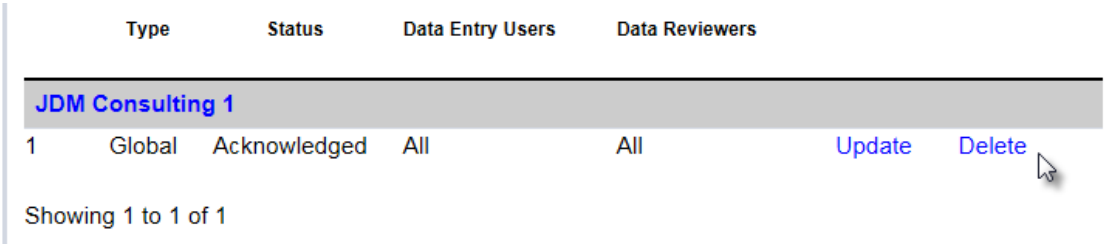
The status of the request will change to Pending and the company that was granted the request will have to acknowledge it again to make the change effective in the system.



D. Removing Access Granted to another Company

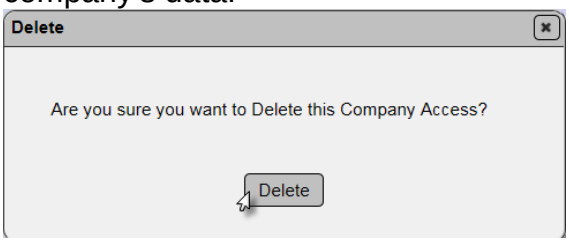
Once you no longer want another company to be able to access and act upon samples on your behalf, you must remove the records that grant the access.

1 Click on the Delete option to delete the granted access.

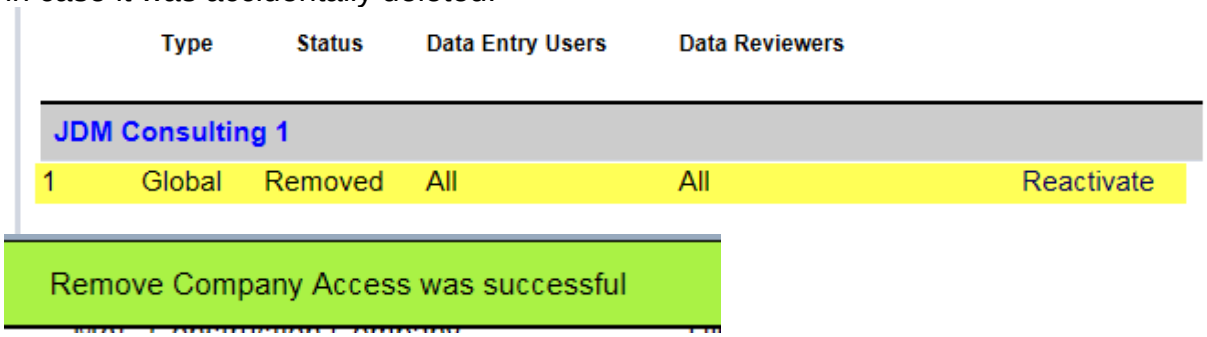


A dialog box will appear to confirm the action.

2. Click on the Delete otion to confirm the deletion of the company's access to your company's data.



The status will be revised to Removed. You will have the ability to reactivate the access in case it was accidentally deleted.



Chapter 10 – Documents

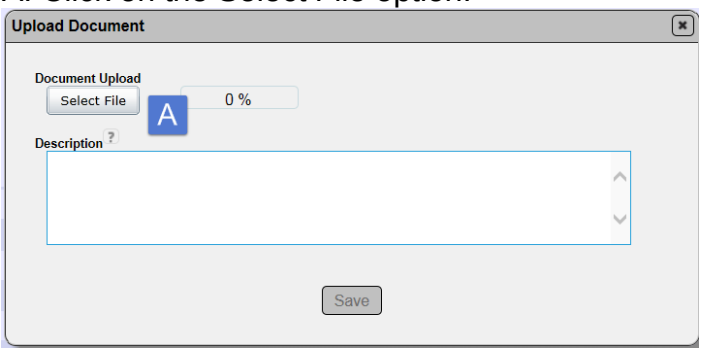
There is a way in MAC to associate documents to the company profile. There are no standard requirements for these functions. They are provided for the convenience of the Company Profile Manager.

A. Attaching a Document to the Company Profile

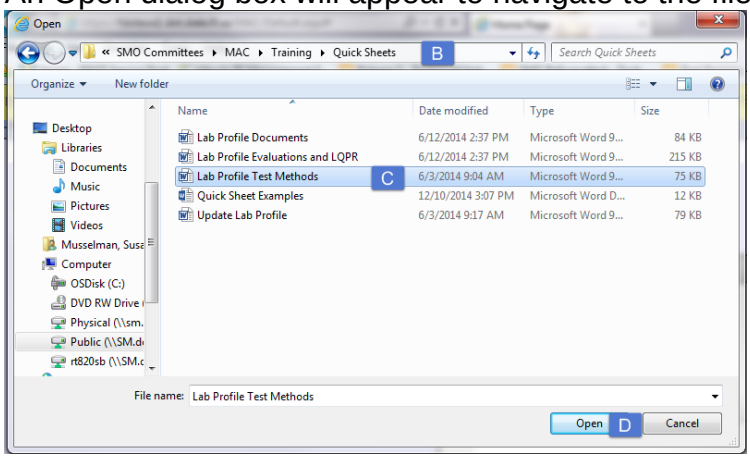
If there are any attachments, such as supporting documentation to be added to the company profile, use the Documents portion of the profile to add the documents.

1. Click on the Documents tab.
2. Click on the Upload Document option.

A. Click on the Select File option.

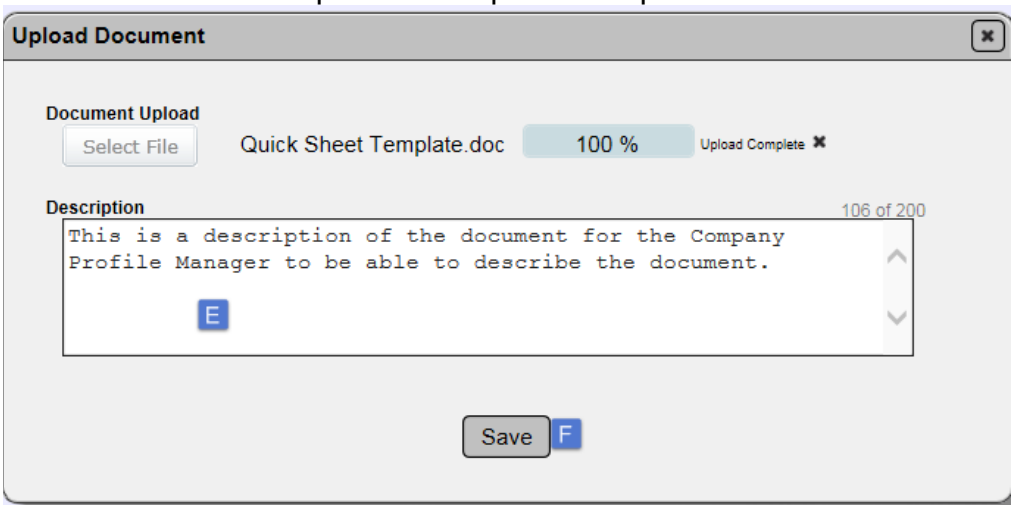


An Open dialog box will appear to navigate to the file you wish to upload.

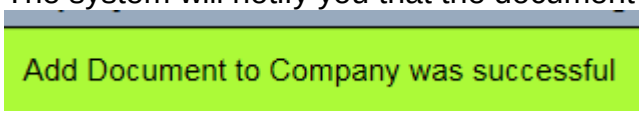


B. Navigate to the location where the file is stored.
C. Select the file you wish to upload.
D.Click on the Open option.

The document will be uploaded to MAC. The Select File option will be grayed out when the document upload is at 100%.
E. Enter a description, if applicable.
F. Click on the Save option to complete the upload.

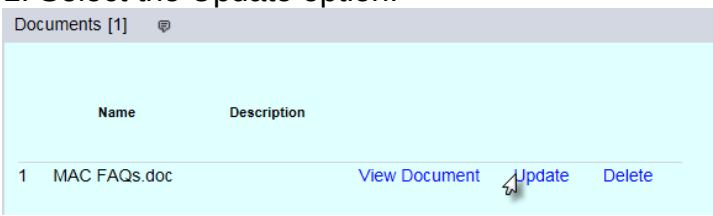


The system will notify you that the document was added successfully.

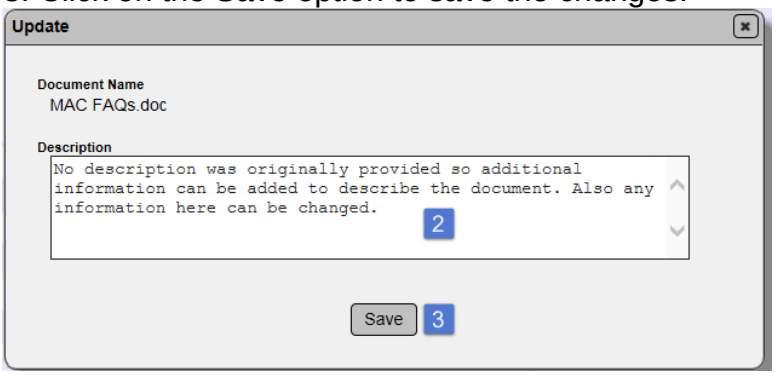


B. Updating the Description of an Document on the Company Profile

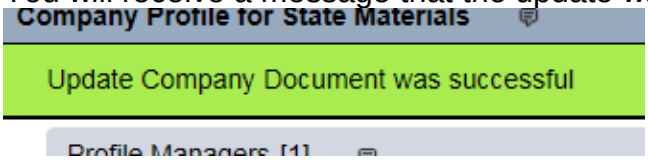
When documents are uploaded to the profile, the descriptive information provided may not be detailed enough. To add information or change the description:
1. Select the Update option.



A dialog box will appear with the original document name (that cannot be chagned) and the description box.
2. Add or revise the description as needed.
3. Click on the Save option to save the changes.



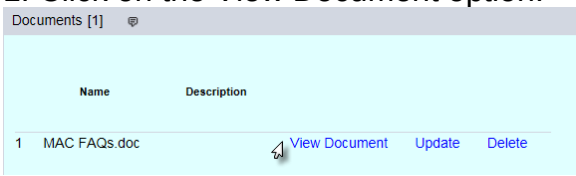
You will receive a message that the update was successful.



C. Viewing a Document on the Company Profile

To view a document already attached to a profile:

1. Click on the View Document option.



A dialog box will appear with a prompt to save or cancel.

2. Select the Save option to continue.

Another dialog box will appear with a prompt to Open Open folder or View downloads.

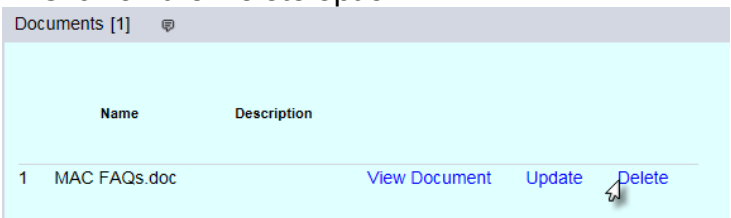
3. Select the Open option to continue.

The document will be opened in a program appropriate for the file format, typically pdf.

D. Deleting a Document from a Company Profile.

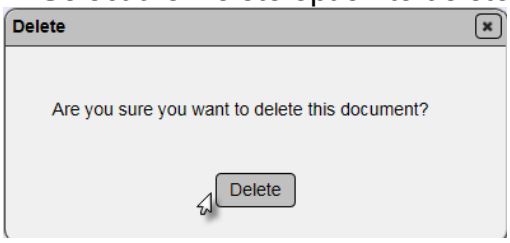
If a document is no longer applicable or out of date, you may wish to remove it from the company profile.

1. Click on the Delete option.

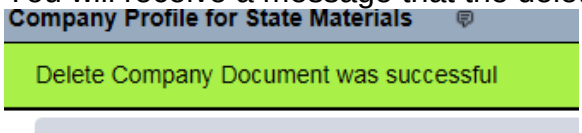


A dialog box will appear confirming the deletion.

2. Select the Delete option to delete the document.



You will receive a message that the deletion was successful.



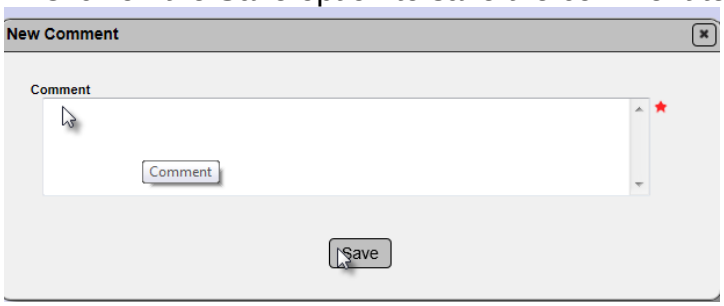
Chapter 11 – Comments

A. Adding a Comment to a Company Profile

1. Click on the Comment tab.
2. Click on the New Comment option.

A New Comment dialog box will appear.

3. Type in your comment.
4. Click on the Save option to save the comment to the company profile.



The system will notify you that the comment was successfully added.

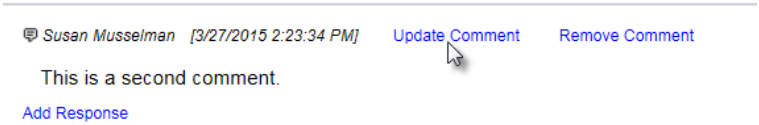
Create Company Comment was successful

B. Updating an Existing Comment on the Company Profile

You may revise comments you entered into the system. You cannot revise comments made by someone else.

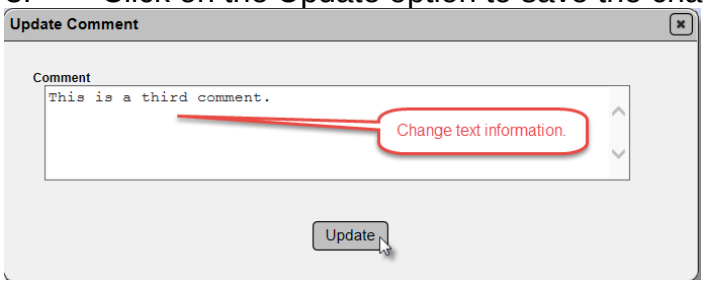
To update your own comment:

1. Click on the Update comment option on the comment you wish to revise.



The dialog box will appear with the comment.

2. Make revisions to the comment.
3. Click on the Update option to save the changes.



The system will notify you that the update was successful.

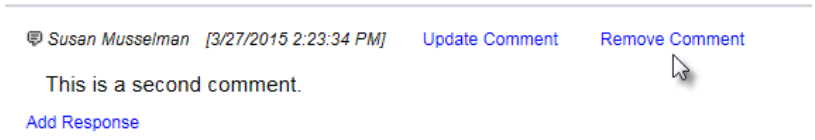
Update Comment was successful

C. Removing an Existing Comment from the Company Profile

You can delete comments you added to the system. You cannot delete comments made by others.

To delete a commeny you previously saved:

1. Click on the Remove Comment option.



A prompt will appear.

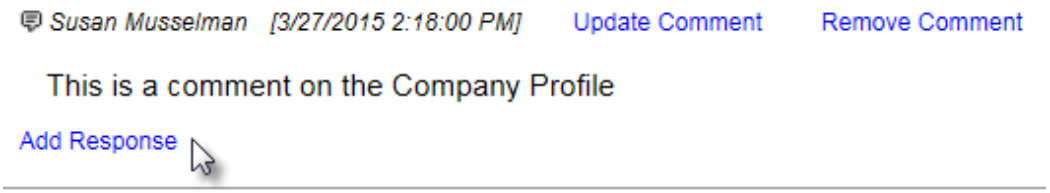
2. If you are sure this is the comment you wish to delete, click on the Delete option.

The system will notify you that the deletion was successful.

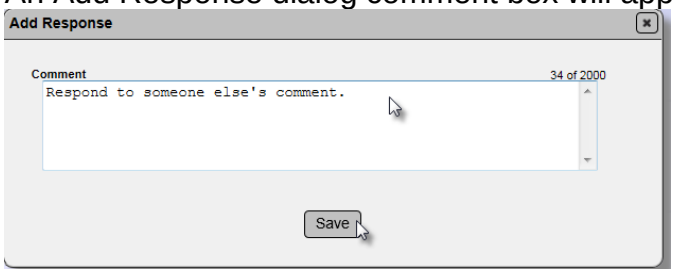
Remove Company Comment was successful

D. Responding to a Others' Comment on a Company Profile

1. On the comment you wish to respond to, click on the Add Response option.



An Add Response dialog comment box will appear.

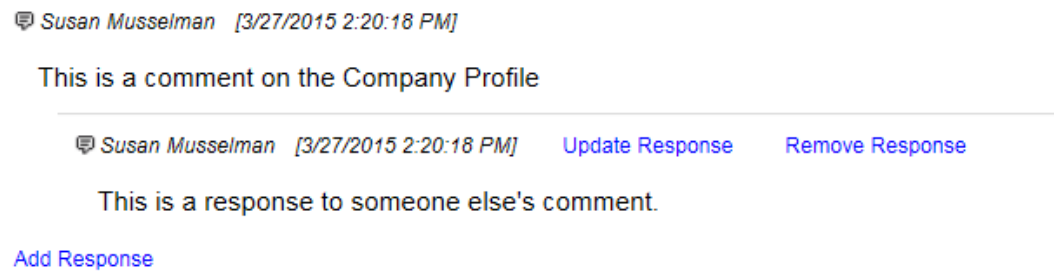


2. Enter your response to the original comment.
3 Click on the Save option to save the response to the record.

The system will notify you that the comment was successfully added.

Add Comment To Company Comment was successful

A response to a comment looks like this in MAC.



NOTE: You can update and remove responses. The steps for this are the same as for updating and removing comments.