

Version

2

ELECTRONIC RECORDS MANAGEMENT SYSTEM

# Real Estate Document Management System User Guide

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# Real Estate Document Management System Workflow

*This workflow is used by INDOT's Real Estate section. This system is available to both INDOT employees as well as Consultants.*

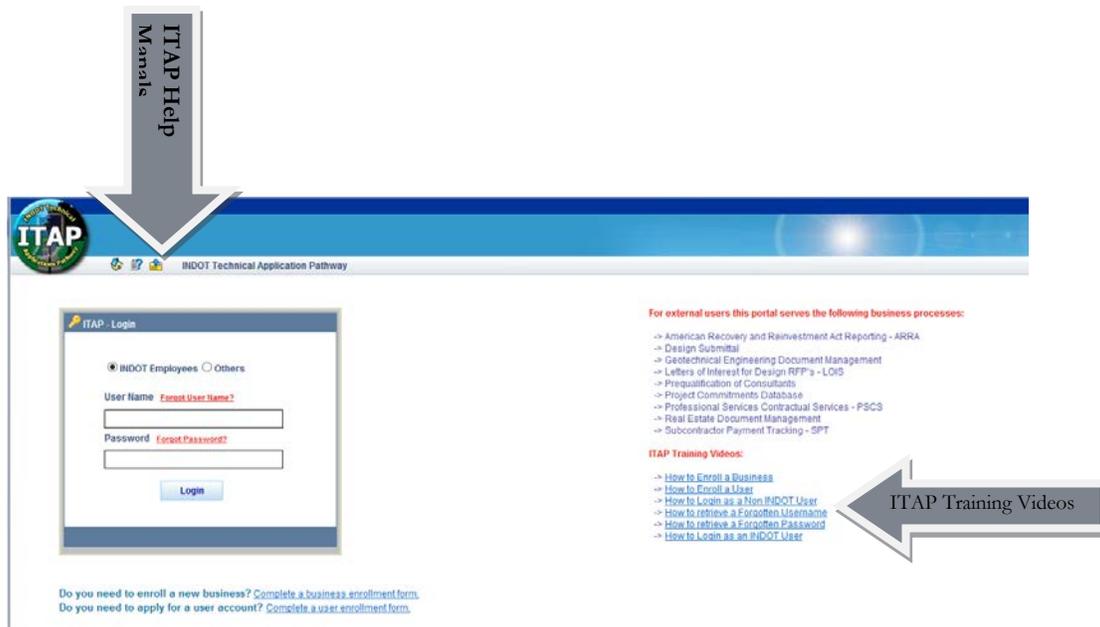
**R**eal Estate Document Management System is an application maintained by Electronic Records Management Section. This system is used by Real Estate Section for facilitating INDOT employees as well as Consultants doing business with INDOT to submit real estate document packets to INDOT. These packets are routed through appropriate tracks so that they reach the right person to be processed.

All users using this system need an ITAP account. Real Estate Document Management System can be accessed through ITAP.

## Using ITAP (INDOT Technical Application Pathway)

To use ITAP, a user needs to be enrolled and have proper access to the application. There are two types of users using this application.

- A Consultant
    - Needs to enroll his/her business in ITAP
    - Once business registration is approved, the individual user needs to enroll using the Business User Registration form. Please use <https://itap.indot.in.gov/login.aspx> to get to business enrollment form as well as business user enrollment form. Users are recommended to utilize ITAP training videos as well as ITAP help guides provided on that page to understand the enrollment process.
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- INDOT Employee

- INDOT Employee will automatically login to ITAP when using ITAP from office. If they are accessing ITAP from outside their office, the user needs to use <https://itap.indot.in.gov/login.aspx> and login using their NETWORKID and password to login with INDOT Employee radio button selected.

**Please utilize ITAP Training Videos to get more information on how to enroll and login to ITAP.**

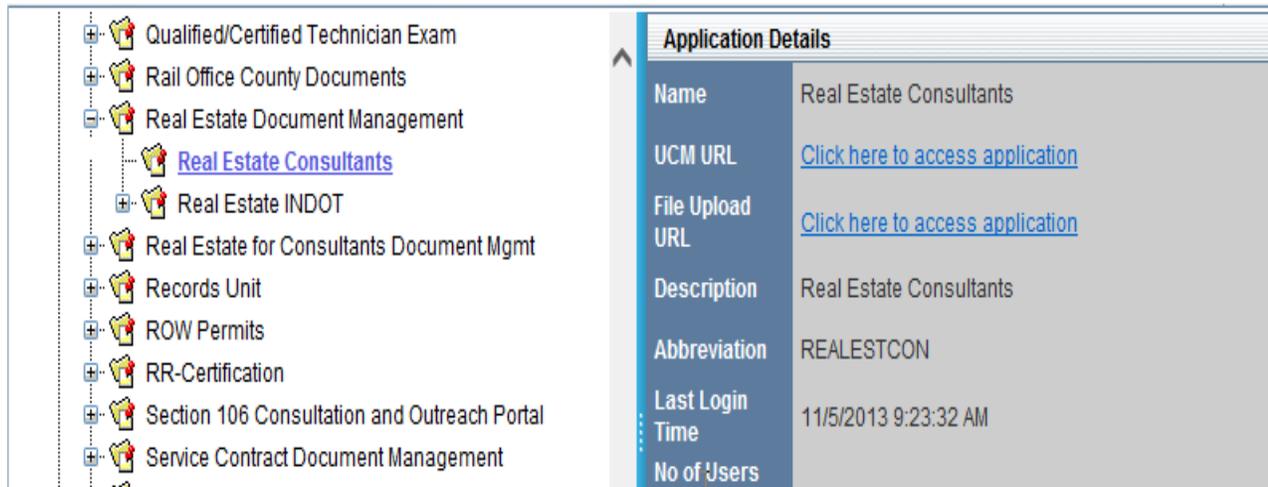


### Requesting the application

Users need to access to Real Estate Document Management application under ERMS node in ITAP. INDOT employees need to request Real Estate INDOT application while Consultants need to request access to Real Estate Consultants Application. While requesting for the access to the application, a user is prompted to select the role that they would need to register to. Please go through this user guide to get more information which role would be right option for the user based on what they need to accomplish.



# Consultants using ITAP to login to ERMS



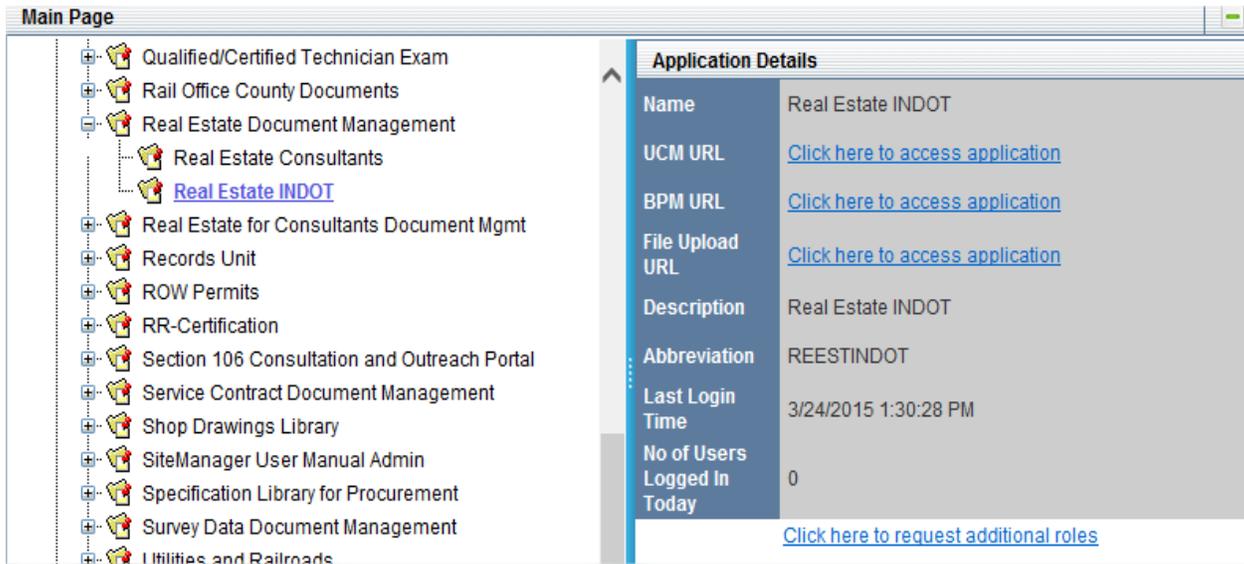
Once the consultant get access to Real Estate Document Management System. Navigate to Real Estate Consultants links like below

ITAP Main Page - > expand ERMS node -> Expand Real Estate Document Management node, And select Real Estate Consultants Application.

The application Details on right frame provide user with two links

- UCM Url - This link navigates the user to UCM Interface (User can upload, search, update, review(checkout and checkin) documents to and from ERMS. (UCM is the document repository for ERMS)
- File Upload Url - This links takes the user to Multifile Upload tool to Upload multiple files to ERMS.

# INDOT EMPLOYEES using ITAP to login to ERMS



Once INDOT Employee gets access to Real Estate Document Management System. Navigate to Real Estate INDOT links like above

ITAP Main Page - > expand ERMS node -> Expand Real Estate Document Management node, And select Real Estate INDOT Application.

The application Details on right frame provides user with three links

- \* UCM Url - This link navigates the user to UCM Interface (User can upload, search, update, review(checkout and checkin) documents to and from ERMS. (UCM is the document repository for ERMS)
- \* BPM Url – This link takes the user to BPM Workspace (This is use to transition documents from one step to the next)
- \* File Upload Url - This links takes the user to Multifile Upload tool to Upload multiple files to ERMS.

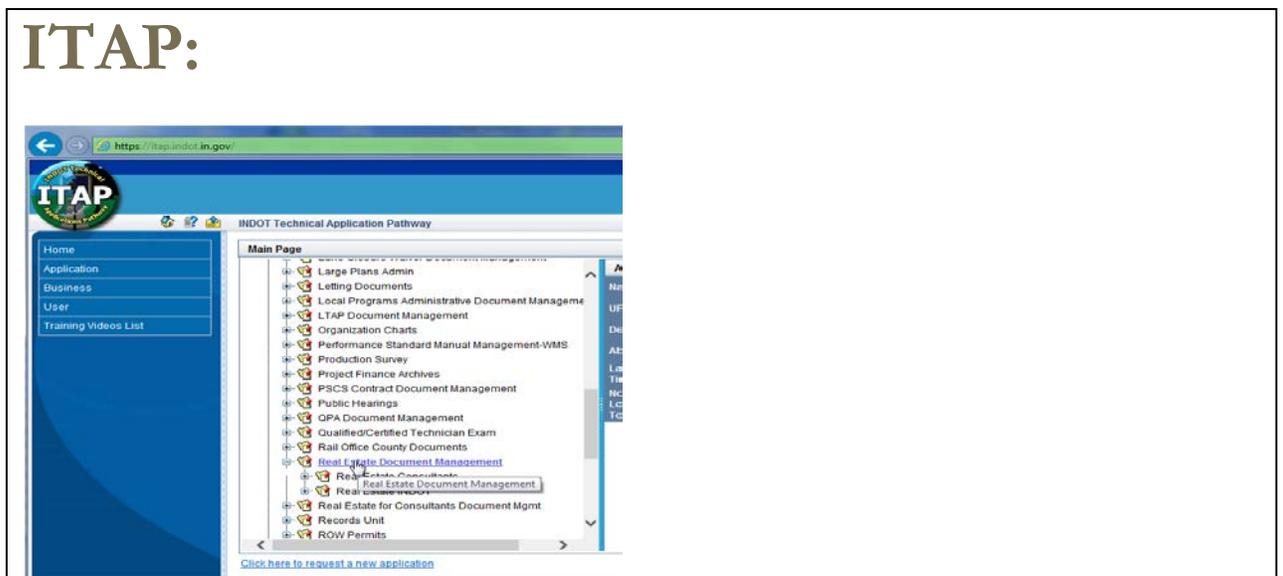
## Real Estate Document Management System - Overview of the Workflow

INDOT employees and consultants requiring access to Real Estate Document Management system need to enroll to proper roles using ITAP.

1. INDOT employee or a consultant logs into ERMS using **ITAP** application
2. INDOT employee or a consultant uploads Real Estate packet for approval process using either **Multi File Upload Tool** or **UCM Checkin Page**
3. The packet is received by INDOT employees with appropriate role to review the packet.

4. Once the packet is reviewed and approved using **BPM** (Oracle Business process management tool), it is released to UCM.
5. During this approval process
  - a. The packet resides in ERMS repository (Oracle UCM), a task is created in BPM to send the packet through the approval process.
  - b. The reviewer with appropriate packet reviewer role will receive the packet based on the packet type selected while uploading the document and review it using **UCM**.
  - c. The reviewer could be an INDOT reviewer or a consultant.
  - d. Once the review is done, the coordinators with RE Coordinator role will have to transition the task from Review status to the next step using **BPM**.
  - e. The task is completed once the coordinator transitions the tasks to one of the final statuses of a specific packet.
  - f. The packets in final status rest in just **UCM**, there won't be any tasks showing up for those packets if the packet is in one of the final statuses. (RE FINALIZED, RE READY FRO BUYING, RE EXEC PAYMENT, RE OBSOLETE DRAFTS, CERTIFIED RECORDS, CERTIFIED DELETES, RE DISCARD). Please see below for screen shots of four applications mentioned in this overview. These screen shots will aid users in identifying which tools users will be using.

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# UCM

ORACLE INDOT

[Home](#) [Search](#) [New Content](#) [New Users](#) [Help](#)

[My Content](#) [New Content](#) [Content Management](#) [Administration](#)

Search

Title:

Content ID:

Date From:  To:

Full Text Search:

Sort By:

# BPM

ORACLE Business Process Workspace

Tasks Case Process Tracking Standard Dashboards More

inc

Title	UCMCreateDate	Author	LA Code	Packet Type	Parcel Number	UCMTitle	UCM Content ID	Project Name
Review Abstracting	4/6/12 9:31 AM	CSLT_UCEA	5477	Abstracting	2	5477 PARCEL 2 TBE UCM10G_DOT_1292		
Review Abstracting	9/27/12 4:30 PM	CSLT_UCEA	4647	Abstracting	10	4647 PARCEL 10 TBE UCM10G_DOT_1371		
Review Abstracting	10/0/12 10:12 AM	CSLT_UCEA	4647	Abstracting	12	4647 PARCEL 12 TBE UCM10G_DOT_1415		
Review Abstracting	11/7/11 4:13 PM	CSLT_UCEA	5278	Abstracting	320	5278 PARCEL 320 TBE UCM10G_DOT_1199		
Review Abstracting	11/7/11 4:10 PM	CSLT_UCEA	5278	Abstracting	309	5278 PARCEL 309 TBE UCM10G_DOT_1199		
Review Abstracting	7/12/12 4:00 PM	CSLT_BFSI	5092	Abstracting	446	5092 PARCEL 446 TBE UCM10G_DOT_1332		
Review Abstracting	3/30/12 9:03 AM	CSLT_BEAM	4605	Abstracting	55	4605 PARCEL 55 TBE UCM10G_DOT_1289		
Review Abstracting	11/1/12 9:41 AM	CSLT_UCEA	5662	Abstracting	2	5662 TRANSMITTAL UCM10G_DOT_1427		
Review Abstracting	9/21/12 10:45 AM	CSLT_UCEA	4647	Abstracting	1,3,4,5,6,7,8,18	4647 TRANSMITTAL UCM10G_DOT_1367		
Review Abstracting	12/6/12 10:40 AM	CSLT_BEAM	4605	Abstracting	61	4605 PARCEL 61 TBE UCM10G_DOT_1546		
Review Abstracting	1/0/13 4:21 PM	CSLT_UCEA	4647	Abstracting	15	4647 PARCEL 15 TBE UCM10G_DOT_1591		
Review Abstracting	10/7/13 9:03 AM	CSLT_AMBR	5189	Abstracting	811	CODE 5829 PARCEL UCM10G_DOT_1785		
Review Appraising	4/16/13 12:51 PM	CSLT_HNTB	5787	Abstracting	01	SR 441 Mitigation str UCM10G_DOT_1649		
Review Abstracting	12/31/13 12:13 PM	CSLT_DLZI	4483	Abstracting	12	4483 PARCEL 12 TBE UCM10G_DOT_1838		
Review Abstracting	5/24/13 11:04 AM	CSLT_DLZI	5202	Abstracting	2	5202 PARCEL 2 TBE UCM10G_DOT_1666		
Review Abstracting	6/7/13 1:23 PM	CSLT_HNTB	5794	Abstracting	02	SR 641 Mitigation str UCM10G_DOT_1674		
Review Abstracting	5/19/14 2:47 PM	CSLT_AMBR	5929	Abstracting	51	CODE 5929 PARCEL UCM10G_DOT_1937		
Review Engineering	12/3/14 11:29 AM	CSLT_DLZI	4483	Abstracting	13	4483 PARCEL 13 TBE UCM10G_DOT_1840		
Review LPA Docs	12/3/14 11:29 AM	CSLT_DLZI	4483	Abstracting	33	4483 PARCEL 33 TBE UCM10G_DOT_1940		
Review Property Management	12/15/14 9:48 AM	CSLT_DLZI	4483	Abstracting	98	4483 PARCEL 98 TBE UCM10G_DOT_2059		
Review Relocation	3/6/14 4:14 PM	CSLT_AMBR	5929	Abstracting	135	CODE 5929 PARCEL UCM10G_DOT_1890		
Review Abstracting	3/6/14 4:35 PM	CSLT_AMBR	5929	Abstracting	157	CODE 5929 PARCEL UCM10G_DOT_1890		
Review Abstracting	3/6/14 4:34 PM	CSLT_AMBR	5929	Abstracting	124	CODE 5929 PARCEL UCM10G_DOT_1899		
Review Abstracting	3/6/14 4:34 PM	CSLT_AMBR	5929	Abstracting	130	CODE 5929 PARCEL UCM10G_DOT_1899		
Review Abstracting	3/7/14 6:17 PM	CSLT_HNTB	5929	Abstracting	119	CODE 5929 PARCEL UCM10G_DOT_1890		
Review Abstracting	2/7/14 3:00 PM	CSLT_DLZI	4483	Abstracting	56	4483 PARCEL 56 TBE UCM10G_DOT_1657		
Review Abstracting	2/7/14 3:00 PM	CSLT_DLZI	4483	Abstracting	20	4483 PARCEL 20 TBE UCM10G_DOT_1657		
Review Abstracting	2/7/14 3:00 PM	CSLT_DLZI	4483	Abstracting	47	4483 PARCEL 47 TBE UCM10G_DOT_1657		
Review Abstracting	5/7/14 8:18 AM	CSLT_AMBR	5929	Abstracting	17	CODE 5929 PARCEL UCM10G_DOT_1927		
Review Abstracting	4/17/14 11:59 AM	CSLT_AMBR	5929	Abstracting	38	CODE 5929 PARCEL UCM10G_DOT_1917		
Review Abstracting	4/22/14 9:48 AM	CSLT_AMBR	5929	Abstracting	87	CODE 5929 PARCEL UCM10G_DOT_1922		
Review Abstracting	3/16/14 5:15 AM	CSLT_AMBR	5929	Abstracting	153	CODE 5929 PARCEL UCM10G_DOT_1895		
Review Abstracting	3/25/14 3:29 PM	CSLT_AMBR	5929	Abstracting	97	CODE 5929 PARCEL UCM10G_DOT_1905		
Review Abstracting	4/08/14 1:53 PM	CSLT_HNTB	5929	Abstracting	65	CODE 5929 PARCEL UCM10G_DOT_1918		

Please select a task to see the details

← →
http://ftpservices.indot.in.gov/mfut11g/default.aspx?Token=x5cJD7X
ftpservices.indot.in.gov

## Multiple File Upload Tool (MFUT)

Indiana Department of Transportation

Please choose the desired type of document :

Design Documents

### Select files

Add files to the upload queue and click the start button.

Filename	Status	Size
Drag files here.		

+ Add Files
▶ Start Upload

0%    0 kb

Enter File Information

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# Workflow related Information

Real Estate Document Workflow has 9 tracks based on the packet type

## *Abstracting Packet Type*

- Users with **RE Abstractors –INDOT** or **RE Abstractors – Consult** role can log into ERMS and upload **Abstracting packets** to ERMS using **Multifile Upload Tool** (Multiple files at a time) or **UCM Checkin** page single file at a time.
- Once the document is uploaded into the system., the author can view the document for the rest of the document life cycle.
- **RE Admins** or **RE Coordinators** can move the documents to the next step using BPM workspace.
- Reviewers can be either an INDOT Employee or a consultant.
- Consultant or INDOT Reviewers can checkout and checkin the documents with markups after review using UCM. The UCM user guide will be found under ERMS User Manuals.
- Once the review process is complete, **RE Admins** or **Coordinators** can approve tasks to be sent to **RE Finalized** or **RE OBSOLETE DRAFTS** or **RE Discard** using **BPM**.
- If there are old copies of submission that need to be kept they could be sent to **RE OBSOLETE DRAFTS**.
- If documents need to be deleted then they could be sent to **RE DISCARD**.

### Packet Type: Abstracting

Roles	State	Action	Application
RE Abstractors - INDOT	<b>RE CREATE</b>	Upload Abstracting packet to ERMS	<b>MFUT UCM</b>
RE Abstractors - Consult	<b>RE CREATE</b>	Upload Abstracting packet to ERMS	<b>MFUT UCM</b>
RE Admins	<b>RE CREATE</b>	Upload Abstracting packet to ERMS	<b>MFUT UCM</b>
RE Abstracting Reviewers - Consultant	<b>RE REVIEW ABSTRACTING</b>	Review Abstracting	<b>UCM</b>
RE Abstracting Reviewers – INDOT	<b>RE REVIEW ABSTRACTING</b>	Review Abstracting	<b>UCM</b>
RE Admins(Only INDOT Employees)	<b>RE REVIEW ABSTRACTING</b>	Transition task from RE REVIEW ABSTRACTING state to one of the following options – <ul style="list-style-type: none"> <li>• <b>RE FINALIZED</b></li> </ul>	<b>BPM</b>

		<ul style="list-style-type: none"> <li>• <b>RE OBSOLETE DRAFTS</b></li> <li>• <b>RE DISCARD</b></li> </ul>			
RE Admins (Only INDOT Employees)	<b>RE FINALIZED</b>	If needed move abstracting packet from RE FINALIZED to either <ul style="list-style-type: none"> <li>• <b>RE OBSOLETE DRAFTS</b></li> <li>• <b>RE DISCARD</b></li> </ul>	<b>UCM</b>		
Related Document Types:					
<table border="1"> <tr> <td><b>Supplemental Abstract</b></td> </tr> <tr> <td><b>Abstract(T&amp;E Report)</b></td> </tr> </table>				<b>Supplemental Abstract</b>	<b>Abstract(T&amp;E Report)</b>
<b>Supplemental Abstract</b>					
<b>Abstract(T&amp;E Report)</b>					

## *Appraising Packet Type*

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- Users with **RE Appraising –INDOT** or **RE Appraising– Consult** role can log into ERMS and upload **Appraising packets** to ERMS using **Multifile Upload Tool** (Multiple files at a time) or **UCM Checkin** page single file at a time.
- Once the document is uploaded into the system., the author can view the document for the rest of the document life cycle.
- **RE Admins** or **RE Coordinators** can move the documents to the next step using BPM workspace.
- Reviewers can be either an INDOT Employee or a consultant.
- Consultant or INDOT Reviewers can checkout and checkin the documents with markups after review using UCM. The UCM user guide will be found under ERMS User Manuals.
- Once the review process is complete, **RE Admins** or **Coordinators** can approve tasks to be sent to **RE Finalized** or **RE OBSOLETE DRAFTS** or **RE Discard** using BPM.
- If there are old copies of submission that need to be kept they could be sent to **RE OBSOLETE DRAFTS**.
- If documents need to be deleted then they could be sent to **RE DISCARD**.

<b>Packet Type: Appraising</b>			
<b>Roles</b>	<b>State</b>	<b>Action</b>	<b>Application</b>
RE Appraising - INDOT	<b>RE CREATE</b>	Upload Appraising packet to ERMS	<b>MFUT UCM</b>
RE Appraising - Consult	<b>RE CREATE</b>	Upload Appraising packet to ERMS	<b>MFUT UCM</b>
RE Admins	<b>RE CREATE</b>	Upload Appraising packet to ERMS	<b>MFUT UCM</b>

RE Appraising Reviewers - Consultant	<b>RE REVIEW APPRAISING</b>	Review Appraising	<b>UCM</b>			
RE Appraising Reviewers – INDOT	<b>RE REVIEW APPRAISING</b>	Review Appraising	<b>UCM</b>			
RE Admins(Only INDOT Employees)	<b>RE REVIEW APPRAISING</b>	Transition task from RE REVIEW APPRAISING state to one of the following options – <ul style="list-style-type: none"> <li>• <b>RE FINALIZED</b></li> <li>• <b>RE OBSOLETE DRAFTS</b></li> <li>• <b>RE DISCARD</b></li> </ul>	<b>BPM</b>			
RE Admins (Only INDOT Employees)	<b>RE FINALIZED</b>	If needed move Appraising packet from RE FINALIZED to either <ul style="list-style-type: none"> <li>• <b>RE OBSOLETE DRAFTS</b></li> <li>• <b>RE DISCARD</b></li> </ul>	<b>UCM</b>			
Related Document Type:						
<table border="1"> <tr> <td><b>Appraisal Problem Analysis</b></td> </tr> <tr> <td><b>Appraisal</b></td> </tr> <tr> <td><b>Appraisal Review</b></td> </tr> </table>				<b>Appraisal Problem Analysis</b>	<b>Appraisal</b>	<b>Appraisal Review</b>
<b>Appraisal Problem Analysis</b>						
<b>Appraisal</b>						
<b>Appraisal Review</b>						

## *Buying Packet Type*

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- Users with **RE Buying –INDOT** or **RE Buying– Consult** role can log into ERMS and upload **Buying packets** to ERMS using **Multifile Upload Tool** (Multiple files at a time) or **UCM Checkin** page single file at a time.
- Once the document is uploaded into the system., the author can view the document for the rest of the document life cycle.
- **RE Admins** or **RE Coordinators** can move the documents to the next step using BPM workspace.
- Reviewers can be either an INDOT Employee or a consultant.
- Consultant or INDOT Reviewers can checkout and checkin the documents with markups after review using UCM. The UCM user guide will be found under ERMS User Manuals.
- Buying packet can be transitioned to Legal Approval state using BPM by RE Admins, RE Coordinators.
- Users with RE LEGAL role can access these Buying packets in this RE LEGAL APPROVAL status. They can checkout and checkin these documents using UCM.
- These packets can be sent from RE LEGAL APPROVAL to BUYING PROCESSING state using BPM by RE Admin or RE Coordinators.
- Once the BUYING PROCESSING is complete, **RE Admins** or **Coordinators** can approve these tasks to be sent to **RE EXEC PAYMENT** or **RE OBSOLETE DRAFTS** or **RE Discard** using **BPM**.

- If there are old copies of submission that need to be kept they could be sent to **RE OBSOLETE DRAFTS**.
- If documents need to be deleted then they could be sent to **RE DISCARD**.

<b>Packet Type: Buying</b>			
<b>Roles</b>	<b>State</b>	<b>Action</b>	<b>Application</b>
RE Buying - INDOT	<b>RE CREATE</b>	Upload Buying packet to ERMS	<b>MFUT UCM</b>
RE Buying - Consult	<b>RE CREATE</b>	Upload Buying packet to ERMS	<b>MFUT UCM</b>
RE Admins	<b>RE CREATE</b>	Upload Buying packet to ERMS	<b>MFUT UCM</b>
RE Buying Reviewers - Consultant	<b>RE REVIEW BUYING</b>	Review Buying packet	<b>UCM</b>
RE Buying Reviewers – INDOT	<b>RE REVIEW BUYING</b>	Review Buying packet	<b>UCM</b>
RE Admins/RE Coords(Only INDOT Employees)	<b>RE REVIEW BUYING</b>	Transition task from RE REVIEW BUYING state to one of the following options – <ul style="list-style-type: none"> <li>• <b>RE LEGAL APPROVAL</b></li> </ul>	<b>BPM</b>
RE LEGAL	<b>RE LEGAL APPROVAL</b>	Review Buying packet	<b>UCM</b>
RE Admins/ RE Coords (Only INDOT Employees)	<b>RE LEGAL APPROVAL</b>	Transition Buying packet task from RE LEGAL APPROVAL to either <ul style="list-style-type: none"> <li>• <b>RE BUYING PROCESSING</b></li> <li>• <b>RE REVIEW BUYING</b></li> </ul>	<b>BPM</b>
RE Admins/RE Coords (Only INDOT Employees)	<b>RE BUYING PROCESSING</b>	Transition Buying packet task from RE BUYING PROCESSING to either <ul style="list-style-type: none"> <li>• <b>RE EXEC PAYMENT</b></li> <li>• <b>RE OBSOLETE DRAFTS</b></li> <li>• <b>RE DISCARD</b></li> </ul>	<b>BPM</b>
RE Admins/RE Coords	<b>RE EXEC PAYMENT</b>	If needed move Buying packet from RE EXEC PAYMENT to either <ul style="list-style-type: none"> <li>• <b>RE OBSOLETE DRAFTS</b></li> <li>• <b>RE DISCARD</b></li> </ul>	<b>UCM</b>
Related Document Types:			
<b>Buyer's Report</b>	<b>Voucher</b>	<b>Direct Deposit Form</b>	

<b>Uniform Offer Letter</b>	<b>Condemnation Report</b>	<b>W-9</b>
<b>Status Report</b>	<b>Affidavit</b>	<b>Transfer Document</b>

## *Engineering Packet Type*

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- Users with **RE Engineering–INDOT** or **RE Engineering– Consult** role can log into ERMS and upload **Engineering packets** to ERMS using **Multifile Upload Tool** (Multiple files at a time) or **UCM Checkin** page single file at a time.
- Once the document is uploaded into the system., the author can view the document for the rest of the document life cycle.
- **RE Admins** or **RE Coordinators** can move the documents to the next step using BPM workspace.
- Reviewers can be either an INDOT Employee or a consultant.
- Consultant or INDOT Reviewers can checkout and checkin the documents with markups after review using UCM. The UCM user guide will be found under ERMS User Manuals.
- Once the review process is complete, **RE Admins** or **Coordinators** can approve tasks to be sent to **RE Finalized** or **RE OBSOLETE DRAFTS** or **RE Discard** using **BPM**.
- If there are old copies of submission that need to be kept they could be sent to **RE OBSOLETE DRAFTS**.
- If documents need to be deleted then they could be sent to **RE DISCARD**.

<b>Packet Type: Engineering</b>			
<b>Roles</b>	<b>State</b>	<b>Action</b>	<b>Application</b>
RE Engineering - INDOT	<b>RE CREATE</b>	Upload Engineering packet to ERMS	<b>MFUT UCM</b>
RE Engineering - Consult	<b>RE CREATE</b>	Upload Engineering packet to ERMS	<b>MFUT UCM</b>
RE Admins	<b>RE CREATE</b>	Upload Engineering packet to ERMS	<b>MFUT UCM</b>
RE Engineering Reviewers - Consultant	<b>RE REVIEW ENGINEERING</b>	Review Engineering	<b>UCM</b>
RE Engineering Reviewers – INDOT	<b>RE REVIEW ENGINEERING</b>	Review Engineering	<b>UCM</b>
RE Admins(Only INDOT Employees)	<b>RE REVIEW ENGINEERING</b>	Transition task from RE REVIEW ENGINEERING state to one of the following options –	<b>BPM</b>

		<ul style="list-style-type: none"> <li>• <b>RE FINALIZED</b></li> <li>• <b>RE OBSOLETE DRAFTS</b></li> <li>• <b>RE DISCARD</b></li> </ul>	
RE Admins (Only INDOT Employees)	<b>RE FINALIZED</b>	If needed move Engineering packet from RE FINALIZED to either <ul style="list-style-type: none"> <li>• <b>RE OBSOLETE DRAFTS</b></li> <li>• <b>RE DISCARD</b></li> </ul>	<b>UCM</b>
Related Document Types:			
<b>Land Description</b>	<b>L-10</b>	<b>Existing ROW Documentation Sheet</b>	
<b>Parcel Plat</b>	<b>Area Computation Sheet</b>		
<b>ROW Plans</b>	<b>Engineering Documentation Sheet</b>		

## *Property Management Packet Type*

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- Users with **RE Property Mgmt –INDOT** or **RE Property Mgmt– Consult** role can log into ERMS and upload **Property Mgmt packets** to ERMS using **Multifile Upload Tool** (Multiple files at a time) or **UCM Checkin** page single file at a time.
- Once the document is uploaded into the system., the author can view the document for the rest of the document life cycle.
- **RE Admins** or **RE Coordinators** can move the documents to the next step using BPM workspace.
- Reviewers can be either an INDOT Employee or a consultant.
- Consultant or INDOT Reviewers can checkout and checkin the documents with markups after review using UCM. The UCM user guide will be found under ERMS User Manuals.
- Once the review process is complete, **RE Admins** or **Coordinators** can approve tasks to be sent to **RE Finalized** or **RE OBSOLETE DRAFTS** or **RE Discard** using **BPM**.
- If there are old copies of submission that need to be kept they could be sent to **RE OBSOLETE DRAFTS**.
- If documents need to be deleted then they could be sent to **RE DISCARD**.

### **Packet Type: Property Mgmt**

<b>Roles</b>	<b>State</b>	<b>Action</b>	<b>Application</b>
RE Property Mgmt - INDOT	<b>RE CREATE</b>	Upload Property Mgmt packet to ERMS	<b>MFUT UCM</b>
RE Property Mgmt - Consult	<b>RE CREATE</b>	Upload Property Mgmt packet to ERMS	<b>MFUT UCM</b>

RE Admins	<b>RE CREATE</b>	Upload Property Mgmt packet to ERMS	<b>MFUT UCM</b>
RE Property Mgmt Reviewers - Consultant	<b>RE REVIEW PROPERT Y MGMT</b>	Review Property Mgmt	<b>UCM</b>
RE Property Mgmt Reviewers – INDOT	<b>RE REVIEW PROPERT Y MGMT</b>	Review Property Mgmt	<b>UCM</b>
RE Admins(Only INDOT Employees)	<b>RE REVIEW PROPERT Y MGMT</b>	Transition task from RE REVIEW PROPERTY MGMT state to one of the following options – <ul style="list-style-type: none"> <li>• <b>RE FINALIZED</b></li> <li>• <b>RE OBSOLETE DRAFTS</b></li> <li>• <b>RE DISCARD</b></li> </ul>	<b>BPM</b>
RE Admins (Only INDOT Employees)	<b>RE FINALIZE D</b>	If needed move Property Mgmt packet from RE FINALIZED to either <ul style="list-style-type: none"> <li>• <b>RE OBSOLETE DRAFTS</b></li> <li>• <b>RE DISCARD</b></li> </ul>	<b>UCM</b>
Related Document Types:			
<b>Eviction Notice</b>	<b>Demolition Contract</b>		
<b>Utility Disconnect Notice</b>	<b>10-Week Letter</b>		
<b>Asbestos Report</b>			

## *RE LPA Packet Type*

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- Users with **RE LPA** role can log into ERMS and upload **RE LPA packets** to ERMS using **Multifile Upload Tool** (Multiple files at a time) or **UCM Checkin** page single file at a time.
- Once the document is uploaded into the system., the author can view the document for the rest of the document life cycle.
- **RE LPA Admin** will assign reviewers for the LPA packet offline and transition the LPA packet from **Ready for Review** to **Review RE LPA Docs**.
- Reviewers will review (Checkout and markup and checkin documents) using UCM.
- Once Review is complete, either Reviewer or RE LPA Admin can transition (move ) the document from **RE Review LPA Docs** to either **REVIEW COMPLETE AWAITING CORRECTIONS** or **REVIEW COMPLETE AWAITING CERTIFICATION**.
- The LPA can checkout and modify and checkin the documents when they are in REVIEW COMPLETE AWAITING CORRECTION using UCM.
- The RE LPA Admin will then upload RE LPA packet with Status Certified Records. These records will end up in CERTIFIED RECORDS status in UCM.
- Later **RE LPA Admin** approve the tasks that need to be sent to **RE CERTIFIED DELETES** from **REVIEW COMPLETE AWAITING CERTIFICATION** using **BPM**.

- **RE LPA** Admin can approve the tasks that are in **RE REVIEW COMPLETE AWAITING CORRECTION** to **REVIEW COMPLETE AWAITING CERTIFICATION** once the corrections are done by LPA.

<b>Packet: RE LPA</b>			
<b>Roles</b>	<b>State</b>	<b>Action</b>	<b>Application</b>
RE LPA	<b>RE CREATE</b>	Upload RE LPA packet to ERMS	<b>MFUT UCM</b>
RE LPA ADMIN	<b>RE READY FOR REVIEW</b>	Assign Reviewers and then transition to Review RE LPA Docs	<b>BPM</b>
RE LPA REVIEWERS	<b>RE REVIEW LPA DOCS</b>	Review LPA Docs Transition reviewed LPA Docs to <ul style="list-style-type: none"> <li>• <b>RE REVIEW COMPLETE AWAITING CORRECTION</b></li> <li>• <b>RE REVIEW COMPLETE AWAITING CERTIFICATION</b></li> </ul>	<b>UCM/BPM</b>
RE LPA REVIEWERS	<b>RE REVIEW COMPLETE AWAITING CORRECTION</b>	View RE LPA packet while it is being updated by LPAS Once updated the task can be transitioned to <b>RE REVIEW COMPLETE AWAITING CERTIFICATION</b>	<b>UCM/BPM</b>
RE LPA	<b>RE REVIEW COMPLETE AWAITING CORRECTION</b>	Update and modify RE LPA packet	<b>UCM</b>
RE LPA Admins (Only INDOT Employees)/RE LPA REVIEWERS	<b>RE REVIEW COMPLETE AWAITING CERTIFICATION</b>	If needed move Staking Report packet from RE FINALIZED to below state if needed <ul style="list-style-type: none"> <li>• <b>RE REVIEW COMPLETE AWAITING CORRECTION</b></li> </ul>	<b>BPM</b>
RE LPA Admins (Only INDOT Employees)	<b>RE CERTIFIED RECORDS</b>	Upload RE LPA PACKET to UCM	<b>MFUT UCM</b>
RE LPA Admins (Only INDOT Employees)	<b>RE REVIEW COMPLETE AWAITING CERTIFICATION</b>	Transition RE LPA packet task to Certified Deletes	<b>BPM</b>

### *Staking Report Packet Type*

- Users with **RE Staking Packet-INDOT** or **RE Staking Packet- Consult** role can log into ERMS and upload **Staking packets** to ERMS using **Multifile Upload Tool** (Multiple files at a time) or **UCM Checkin** page single file at a time.

- Once the document is uploaded into the system., the author can view the document for the rest of the document life cycle.
- **RE Admins** or **RE Coordinators** can move the documents to the next step using BPM workspace.
- Reviewers can be either an INDOT Employee or a consultant.
- Consultant or INDOT Reviewers can checkout and checkin the documents with markups after review using UCM. The UCM user guide will be found under ERMS User Manuals.
- Once the review process is complete, **RE Admins** or **Coordinators** can approve tasks to be sent to **RE Finalized** or **RE OBSOLETE DRAFTS** or **RE Discard** using BPM.
- If there are old copies of submission that need to be kept they could be sent to **RE OBSOLETE DRAFTS**.
- If documents need to be deleted then they could be sent to **RE DISCARD**.

### Packet Type: Staking Report

<b>Roles</b>	<b>State</b>	<b>Action</b>	<b>Application</b>
RE Staking Report - INDOT	<b>RE CREATE</b>	Upload Staking Report packet to ERMS	<b>MFUT UCM</b>
RE Staking Report - Consult	<b>RE CREATE</b>	Upload Staking Report packet to ERMS	<b>MFUT UCM</b>
RE Admins	<b>RE CREATE</b>	Upload Staking Report packet to ERMS	<b>MFUT UCM</b>
RE Staking Report Reviewers - Consultant	<b>RE REVIEW STAKING REPORT</b>	Review Staking Report	<b>UCM</b>
RE Staking Report Reviewers – INDOT	<b>RE REVIEW STAKING REPORT</b>	Review Staking Report	<b>UCM</b>
RE Admins(Only INDOT Employees)	<b>RE REVIEW STAKING REPORT</b>	Transition task from RE REVIEW STAKING REPORT state to one of the following options – <ul style="list-style-type: none"> <li>• <b>RE FINALIZED</b></li> <li>• <b>RE OBSOLETE DRAFTS</b></li> <li>• <b>RE DISCARD</b></li> </ul>	<b>BPM</b>
RE Admins (Only INDOT Employees)	<b>RE FINALIZED</b>	If needed move Staking Report packet from RE FINALIZED to either <ul style="list-style-type: none"> <li>• <b>RE OBSOLETE DRAFTS</b></li> <li>• <b>RE DISCARD</b></li> </ul>	<b>UCM</b>