

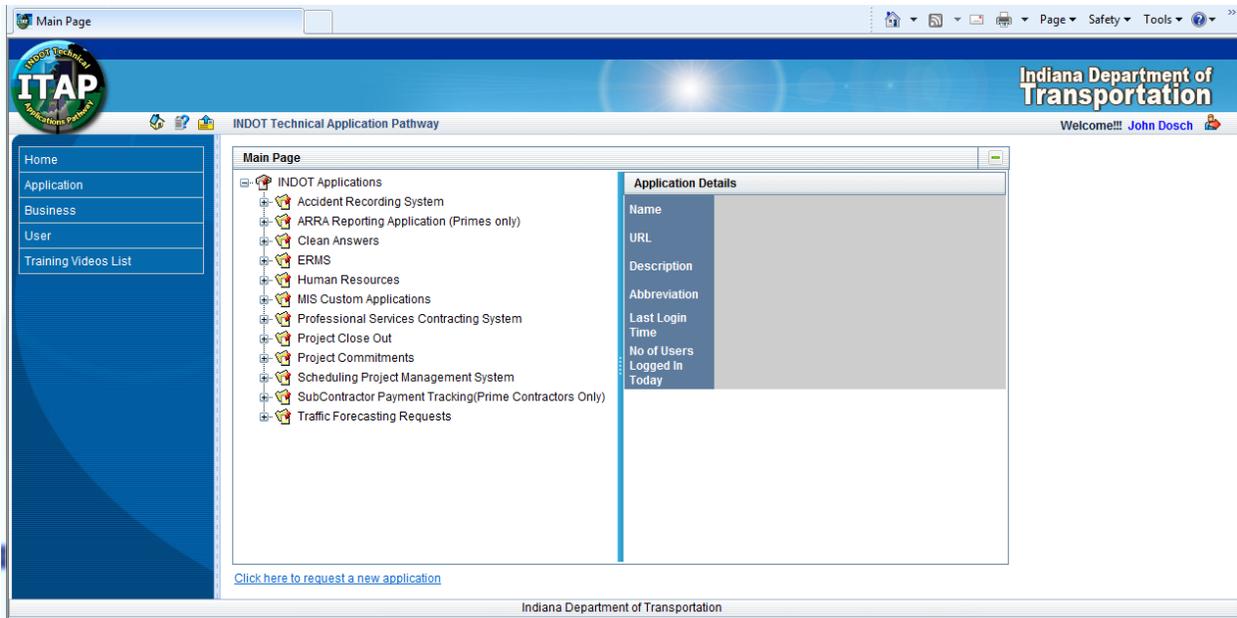
Construction Changes Workflow

By John Dosch
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- 1.) Getting to the Construction Change Workflow Links
- 2.) Workflow Layout
- 3.) How Security is Determined
- 4.) Security By State
- 5.) Initial Submission Interfaces
 - a.)UCM
 - b.)MFUT
- 6.) Transition Example
- 7.) Available Roles

1.) Getting to the Construction Change Workflow Links

In order to get to the links for the Construction Changes Workflow users will need to go through ITAP. The web address of ITAP is <https://itap.indot.in.gov> . After going here and logging in, the user will be at the homepage for ITAP.



From here, the user must click through the following chain of applications to arrive at the links for the Construction Changes Workflow.

- 1.) INDOT Applications
- 2.) ERMS
- 3.) Construction Changes Document Management System

After clicking through this chain of applications, the user will find themselves at the links for the Construction Changes Workflow.

Application Details	
Name	Construction Changes Document Management System
UCM URL	Click here to access application
BPM URL	Click here to access application
File Upload URL	Click here to access application
Description	Construction Changes Document Management System
Abbreviation	CC
Last Login Time	10/30/2014 4:30:02 PM
No of Users Logged In Today	1

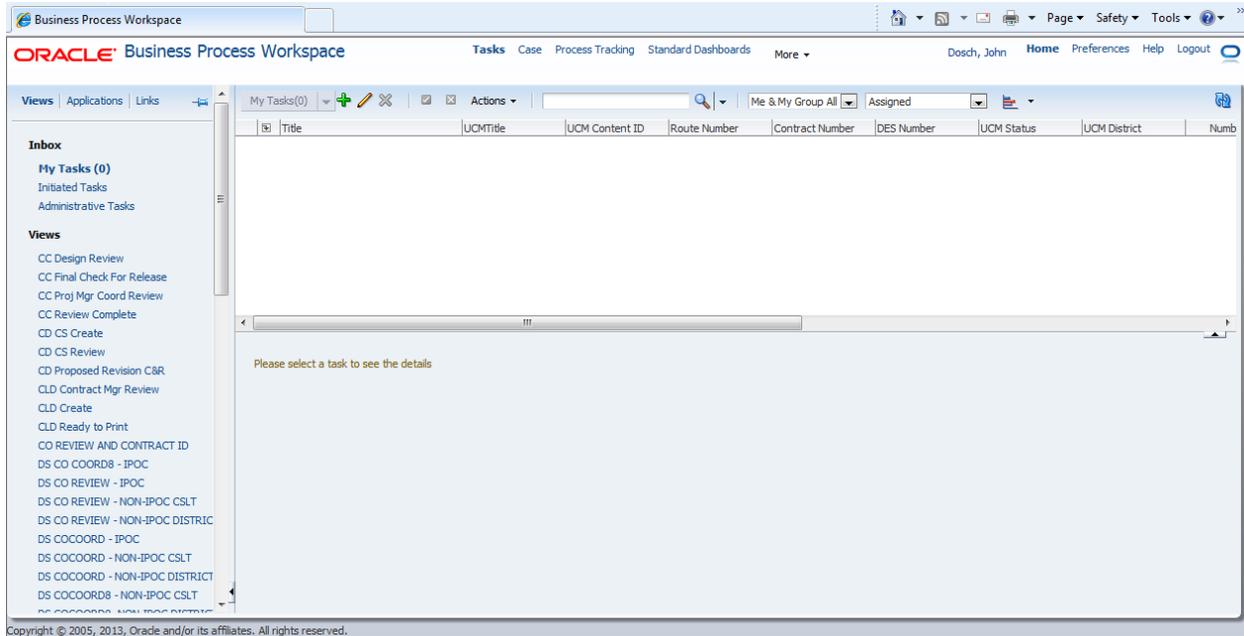
The three links are broken out as follows.

- UCM URL – Will take the user to the UCM (Universal Content Management) part of ERMS.

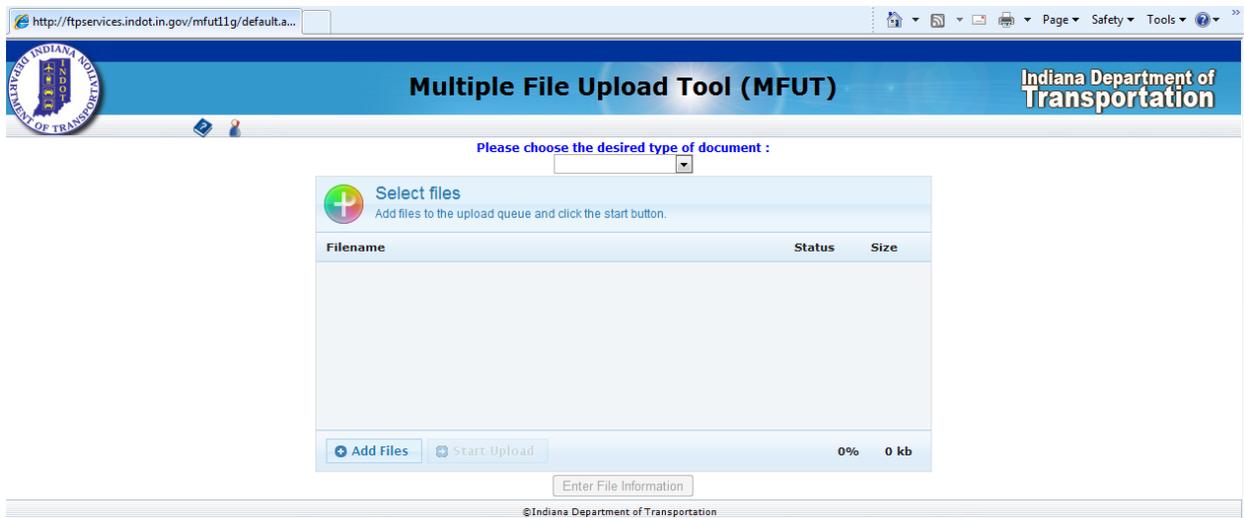
The screenshot shows the Oracle ERMS search interface. The browser address bar displays "Home Page for JDOSCH". The Oracle logo and "INDOT" are visible in the top left. The navigation menu includes "Search", "New Check-In", "ERMS User Manuals", and "Helpdesk". The user "Dosch, John" is logged in. The search area contains the following fields and options:

- Title:
- Content ID:
- Release Date: From To
- Full-Text Search:
- Sort By: Release Date Descending

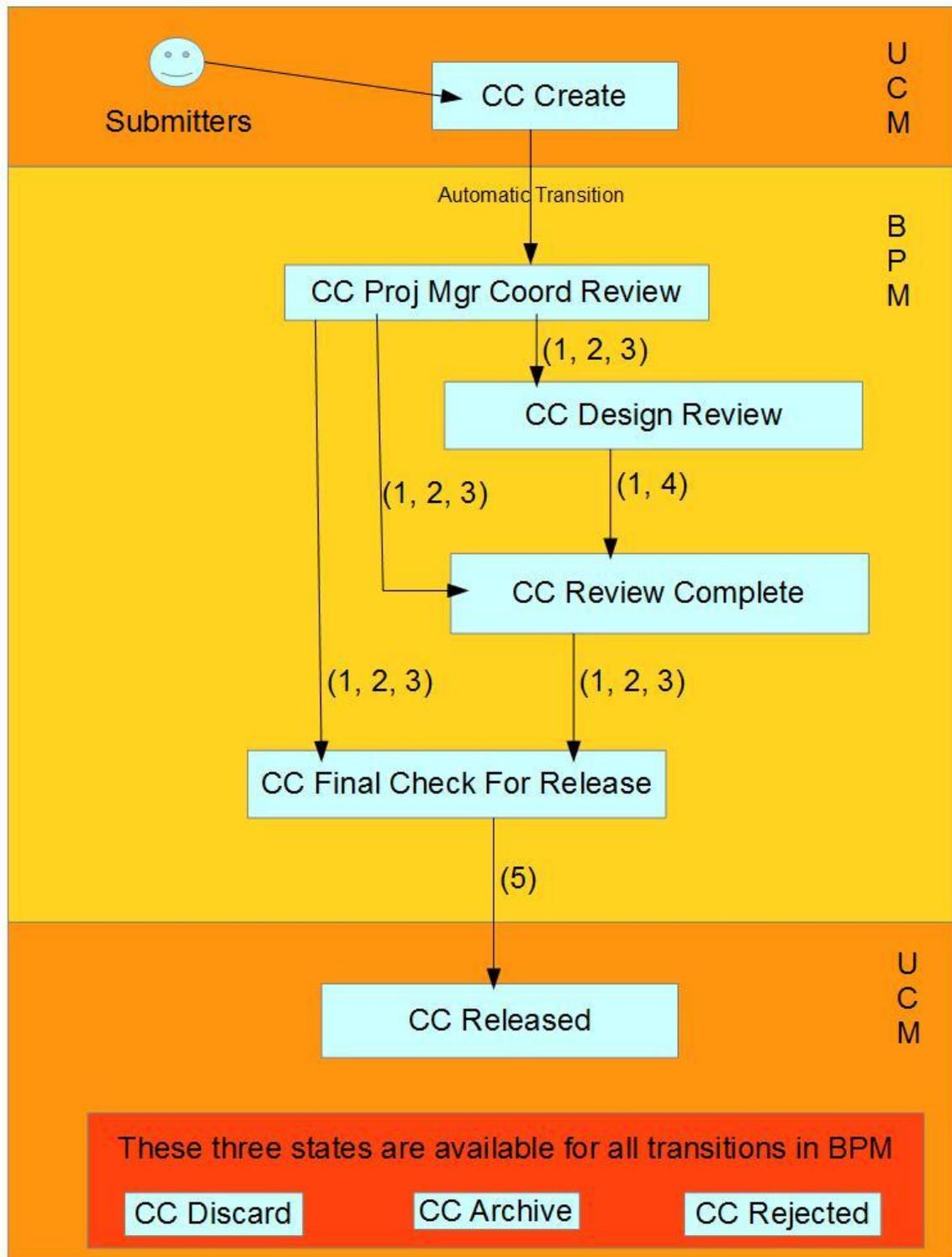
- BPM URL – Will take the user to the BPM (Business Process Management) part of ERMS.



- File Upload URL – Will take the user to the MFUT (Multiple File Upload Tool)



2.) Workflow Layout



Presented in the above figure is a diagram of the Construction Changes Workflow. A few key points about the diagram follow.

- The “Submitters” group includes the roles of :
 - Administrators
 - Consultants
 - Project Manager – Central Office
 - Project Manager – Crawfordsville
 - Project Manager – Fort Wayne
 - Project Manager – Greenfield
 - Project Manager – LaPorte
 - Project Manager – Seymour
 - Project Manager – Vincennes
 - Coordinator – Central Office
 - Coordinator – Crawfordsville
 - Coordinator – Fort Wayne
 - Coordinator – Greenfield
 - Coordinator – LaPorte
 - Coordinator – Seymour
 - Coordinator – Vincennes
 - Area Engineer – Crawfordsville
 - Area Engineer – Fort Wayne
 - Area Engineer – Greenfield
 - Area Engineer – LaPorte
 - Area Engineer – Seymour
 - Area Engineer – Vincennes
- The number on each of the transitions says who is capable of making the transition and corresponds to the following list :
 1. Administrators
 2. Assigned Project Manager
 3. Assigned Coordinator
 4. Assigned Reviewer
 5. Final Check For Release Reviewer
- The three status options shown at the bottom of the workflow diagram; CC Discard, CC Archive, and CC Rejected; are available as options on each transition to the acting user.

3.) How Security is Determined

When a document enters the Construction Change workflow it is setup with an initial set of security that is dependent on two of the metadata fields entered. Those two metadata fields are “District” and “Reviewer.” The options for each are as follows.

- District
 - Crawfordsville
 - Fort Wayne
 - Greenfield
 - LaPorte
 - Seymour
 - Vincennes
- Reviewer
 - Central Office
 - District

How these two fields are chosen sets the assigned project manager, the assigned area engineer, the assigned coordinator, and the assigned reviewer. The following list summarizes how each combination sets the security.

<u>District</u>	<u>Reviewer</u>	<u>Assigned Roles</u>
Crawfordsville	District	Project Manager – Crawfordsville Area Engineer – Crawfordsville Coordinator – Crawfordsville Reviewer – Crawfordsville
Fort Wayne	District	Project Manager – Fort Wayne Area Engineer – Fort Wayne Coordinator – Fort Wayne Reviewer – Fort Wayne
Greenfield	District	Project Manager – Greenfield Area Engineer – Greenfield Coordinator – Greenfield Reviewer – Greenfield

LaPorte	District	Project Manager – LaPorte Area Engineer – LaPorte Coordinator – LaPorte Reviewer – LaPorte
Seymour	District	Project Manager – Seymour Area Engineer – Seymour Coordinator – Seymour Reviewer – Seymour
Vincennes	District	Project Manager – Vincennes Area Engineer – Vincennes Coordinator – Vincennes Reviewer – Vincennes
Crawfordsville	Central Office	Project Manager – Central Office Project Manager – Crawfordsville Area Engineer – Crawfordsville Coordinator – Central Office Coordinator – Crawfordsville Reviewer – Central Office Reviewer – Crawfordsville
Fort Wayne	Central Office	Project Manager – Central Office Project Manager – Fort Wayne Area Engineer – Fort Wayne Coordinator – Central Office Coordinator – Fort Wayne Reviewer – Central Office Reviewer – Fort Wayne

Greenfield	Central Office	Project Manager – Central Office Project Manager – Greenfield Area Engineer – Greenfield Coordinator – Central Office Coordinator – Greenfield Reviewer – Central Office Reviewer – Greenfield
LaPorte	Central Office	Project Manager – Central Office Project Manager – LaPorte Area Engineer – LaPorte Coordinator – Central Office Coordinator – LaPorte Reviewer – Central Office Reviewer – LaPorte
Seymour	Central Office	Project Manager – Central Office Project Manager – Seymour Area Engineer – Seymour Coordinator – Central Office Coordinator – Seymour Reviewer – Central Office Reviewer – Seymour
Vincennes	Central Office	Project Manager – Central Office Project Manager – Vincennes Area Engineer – Vincennes Coordinator – Central Office Coordinator – Vincennes Reviewer – Central Office Reviewer – Vincennes

4.) Security by State

STATE	ROLE	READ	WRITE	DELETE	TRANSITION
CC Proj Mgr Coord Review	CC Administrator	Y	Y		Y
	Assigned Project Manager	Y	Y		Y
	Assigned Area Engineer	Y			
	Assigned Coordinator	Y	Y		Y
	Assigned Reviewer	Y	Y		
STATE	ROLE	READ	WRITE	DELETE	TRANSITION
CC Design Review	CC Administrator	Y	Y		Y
	Assigned Project Manager	Y	Y		
	Assigned Area Engineer	Y			
	Assigned Coordinator	Y	Y		
	Assigned Reviewer	Y	Y		Y
STATE	ROLE	READ	WRITE	DELETE	TRANSITION
CC Review Complete	CC Administrator	Y	Y		Y
	Assigned Project Manager	Y	Y		Y
	Assigned Area Engineer	Y			
	Assigned Coordinator	Y	Y		Y
	Assigned Reviewer	Y			
STATE	ROLE	READ	WRITE	DELETE	TRANSITION
CC Final Check For Release	CC Administrator	Y	Y		
	Assigned Project Manager	Y			
	Assigned Area Engineer	Y			
	Assigned Coordinator	Y			
	Assigned Reviewer	Y			
	CC Final Reviewer	Y	Y		Y
STATE	ROLE	READ	WRITE	DELETE	TRANSITION
CC Rejected	CC Administrator	Y			
	Assigned Project Manager	Y			
	Assigned Area Engineer	Y			
	Assigned Coordinator	Y			
	Assigned Reviewer	Y			
	CC Final Reviewer	Y			
STATE	ROLE	READ	WRITE	DELETE	TRANSITION
CC Discard	CC Administrator	Y			

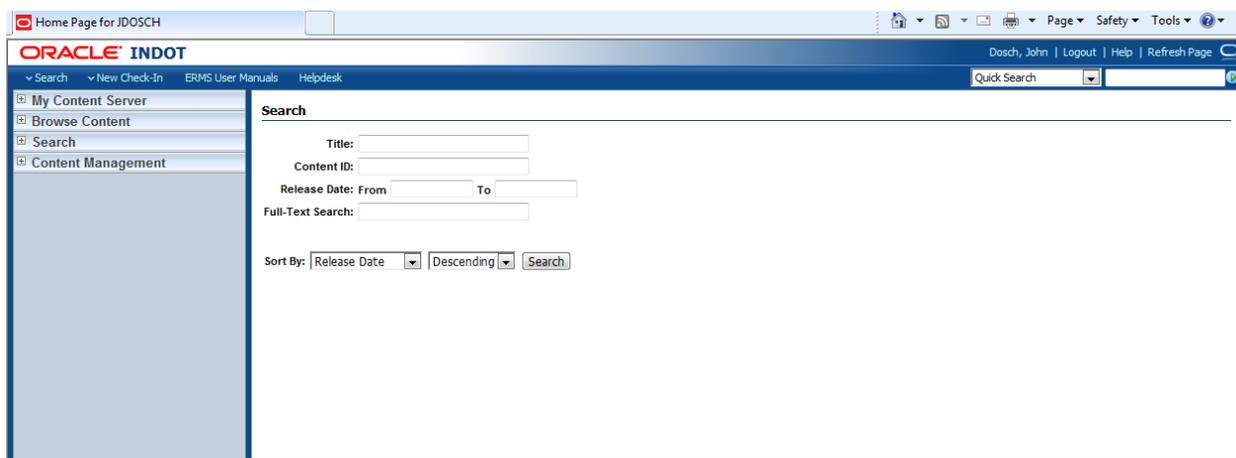
STATE	ROLE	READ	WRITE	DELETE	TRANSITION
CC Archive	CC Administrator	Y			
	Assigned Project Manager	Y			
	Assigned Area Engineer	Y			
	Assigned Coordinator	Y			
	Assigned Reviewer	Y			
	CC Final Reviewer	Y			
STATE	ROLE	READ	WRITE	DELETE	TRANSITION
CC Exception	CC Administrator	Y			
	Assigned Project Manager	Y			
	Assigned Area Engineer	Y			
	Assigned Coordinator	Y			
	Assigned Reviewer	Y			
	CC Final Reviewer	Y			
STATE	ROLE	READ	WRITE	DELETE	TRANSITION
CC Released	CC Administrator	Y	Y		
	Assigned Project Manager	Y			
	Assigned Area Engineer	Y			
	Assigned Coordinator	Y			
	Assigned Reviewer	Y			
	CC Final Reviewer	Y			
	CC Viewers	Y			
	CC Consultants	Y			

5.) Initial Submission Interfaces

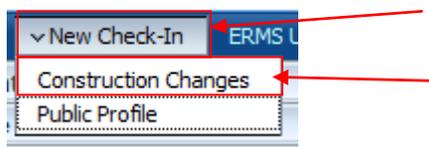
There are two interfaces users will use to submit documents into the system. They are the UCM interface and the MFUT interface.

3.a) UCM

As shown earlier the UCM interface is reachable through ITAP by using the UCM URL link.



To start the check in process, click on the “New Check-In” dropdown and choose the option for “Construction Changes.”



This will bring up the form for checking in a new document.

Content Check-In Form for Construction Changes

Construction Changes [Hide]

* Title

Author JDOSCH

* Revision 1

* Security Group

* Profile

* Account

* Status

* Document Type

* PrimaryDESNumber

* DES Number

* District

* Route Number

* Contract Number

* LettingDate 

* Reviewer

* County

Project Number

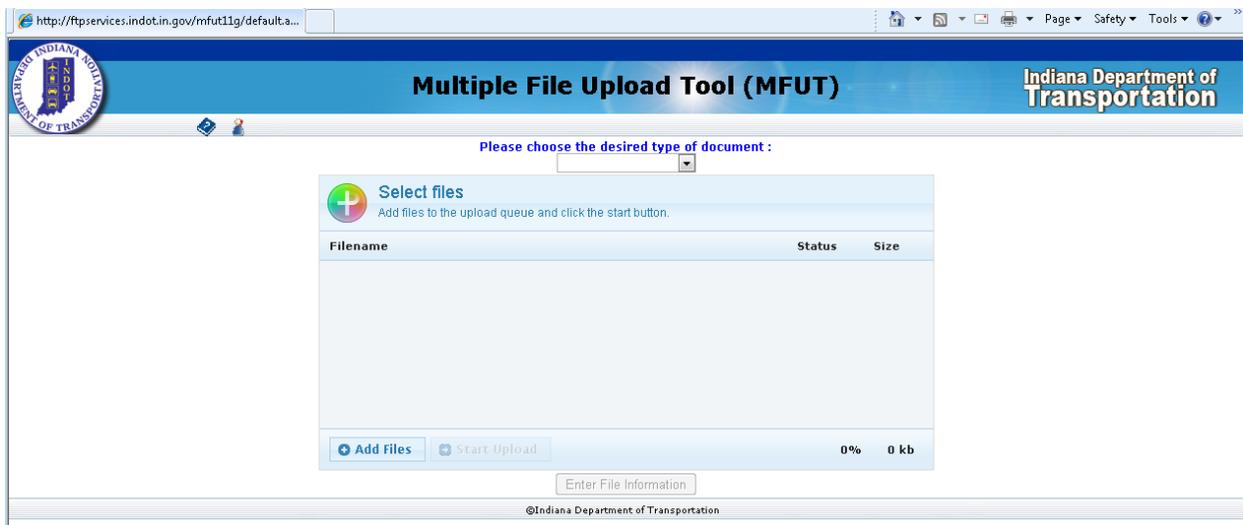
Location

Structure Number

From here, fill out the required fields (marked in red) and select your file. Then click on the “Check In” button to submit the file. For everyone, except for those in the administrator’s role for construction changes, the only status available will be “CC Create.” As can be seen from the workflow diagram, this status is the starting status for the workflow.

3.b) MFUT

As shown earlier, the MFUT application is available through the “File Upload URL” link in ITAP.



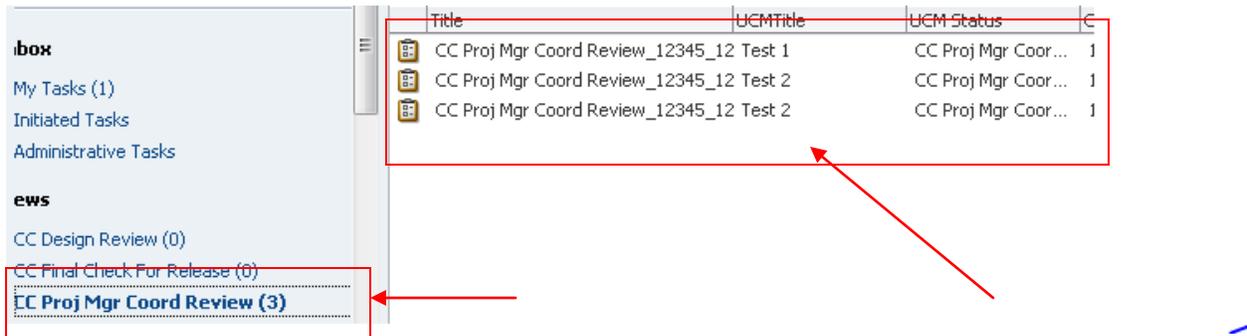
A manual for the MFUT application is available through the website.

6.) Transition Example

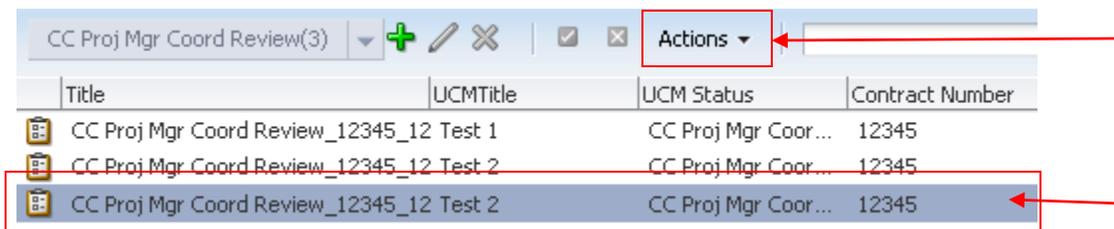
This transition example will cover transitioning a document from the status of “CC Proj Mgr Coord Review” to the status of “CC Final Check For Release.” All other transitions are similar. In order to move a document from one status to the other, users must use the BPM part of ERMS. As seen earlier, the BPM interface is available through the “BPM URL” link in ITAP. Once the user is in BPM, they should select the appropriate view for the document they wish to find. There are views for construction change documents in the following states.

- CC Proj Mgr Coord Review
- CC Design Review
- CC Review Complete
- CC Final Check For Release

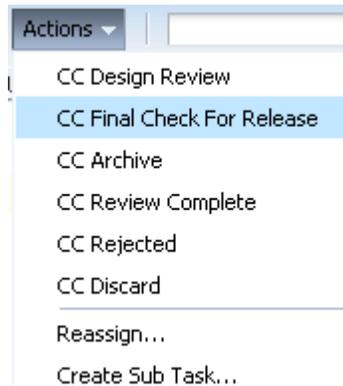
For this example, the user should select the “CC Proj Mgr Coord Review” view. This will show all the documents currently in the status of “CC Proj Mgr Coord Review.”



Select the file(s) that need to be transitioned, and then click on the “Actions” dropdown to select the destination for the files.



The top of the “Actions” dropdown will show the possible destinations for the file. This list of options will update according to the status of the selected file(s). For this example, the user would select “CC Final Check For Release.”



After the user makes that selection, the file will be updated in both the UCM and BPM parts of ERMS to be in the status of “CC Final Check For Release.”

7.) Available Roles

- Construction Changes Admin
- Construction Changes Consultants
- Coordinator Central Office
- Coordinator Crawfordsville
- Coordinator Fort Wayne
- Coordinator Greenfield
- Coordinator LaPorte
- Coordinator Seymour
- Coordinator Vincennes
- Design Reviewer Central Office
- Design Reviewer Crawfordsville
- Design Reviewer Fort Wayne
- Design Reviewer Greenfield
- Design Reviewer LaPorte
- Design Reviewer Seymour
- Design Reviewer Vincennes
- Area Engineer Crawfordsville
- Area Engineer Fort Wayne
- Area Engineer Greenfield
- Area Engineer LaPorte
- Area Engineer Seymour
- Area Engineer Vincennes
- Final Check For Release Reviewer
- Project Manager Central Office
- Project Manager Crawfordsville
- Project Manager Fort Wayne
- Project Manager Greenfield
- Project Manager LaPorte
- Project Manager Seymour
- Project Manager Vincennes
- Construction Changes Viewers

All applications for access into the Construction Changes Workflow must go through ITAP. In order to get help on the proper process for applying for access, users should see the training videos available under the “Training Videos List” option in the left hand navigation menu in ITAP.

