# UTILITY RELOCATION ELECTRONIC DOCUMENT MANAGEMENT SYSTEM (UREDMS)

## TRAINING MANUAL – EXTERNAL USERS

*prepared for*

Commonwealth of Pennsylvania
Department of Transportation
Bureau of Project Delivery



VERSION 2.0
Last Updated: August 2013

# Table of Contents

# 1 GETTING STARTED

The UREDMS External Web Interface provides PennDOT's business partners with the ability to securely submit and view utility relocation documents through the web.

The PennDOT UREDMS External Web Interface uses PennDOT's ECMS security for logging in.

When you are signed into the External Web Interface, you are also signed in to ECMS. This means you can access any ECMS features you are authorized for. Simply click one of the ECMS links on the Navigation Bar.

> **CAUTION**: You must change your password every 60 days or it will expire.

Your primary contact can add you through ECMS. For other assistance with User IDs and passwords, call the ECMS Help Desk (717-783-7711).

If you are not logged in, you may not access projects or documents. You may access UREDMS Help or any of the links to other systems in the navigation bar.

Once logged in, you may view only projects and documents for your own utility or municipality.

## High level process

On a high level, you will typically use the UREDMS External Web Interface to download and submit project documents.
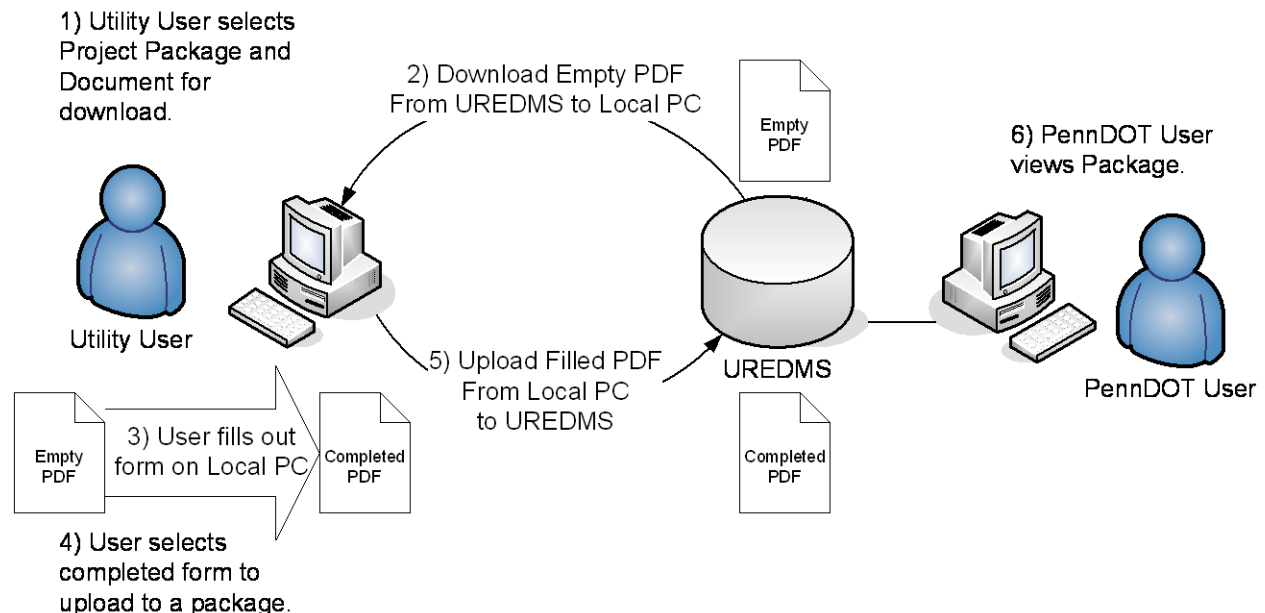
# Accessing the External Web Interface

To access the UREDMS External Web interface:

1.  Start Internet Explorer.

2.  Enter the Web site by typing the Web address www.dot14.state.pa.us/uredmsweb/ (for the production site) in the Internet Explorer **Address** field.
    The Home page displays.

**NOTE**: Alternately, you can assign the home page to a shortcut.

For the Training Session, use the Web address provided by the instructor. (https://www.dotdev15.state.pa.us/uredmsweb/login.jsp

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**Utility Relocation - Electronic Document Management System**

You must be an ECMS registered user to login to the UREDMS    Login

Home

**Projects**
Current Projects
Completed Projects
Historical Projects

**Links**
Home
UREDMS Help
UR Contact List
ECMS Registration
eBidding
PennDOT Home
UREDMS ETraining

**Did You Know?**

- In order to take advantage of the many benefits of doing business electronically with PennDOT, Utility Companies must use UR-EDMS. Some of the key benefits are:
    - saves time and money
    - quicker submission and response times
    - electronic document storage capability

**Contacts**

- For questions regarding this site or the business partner registration process; please contact the ECMS Help Desk at (717) 783-7711.

This site is best viewed with Internet Explorer 6.0/SP1 and a screen resolution of 1024x768

Top

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# Logging On to the External Web Interface

To log into UREDMS, your utility or municipality must be a registered business partner in PennDOT's ECMS System and your administrator must have entered your name into ECMS.

To obtain an ECMS user ID and password, your administrator can register you as follows:

1. Open the ECMS Web site.

2. Log onto ECMS.

3. Click the Administration button on the left side of the screen.
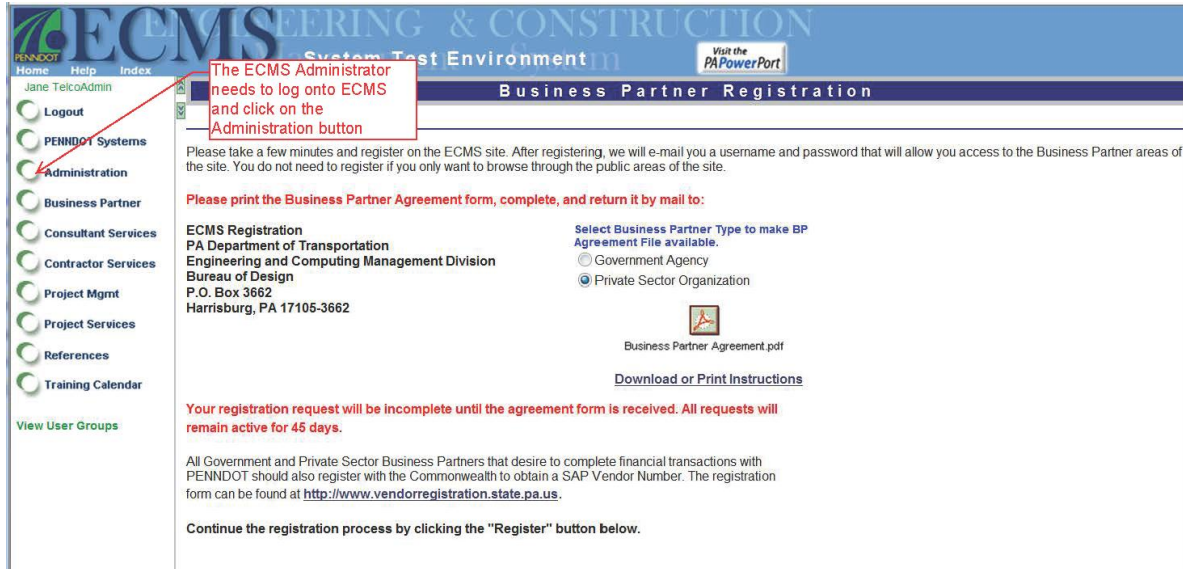


4. Click the Application Security link. The Application Security page opens.
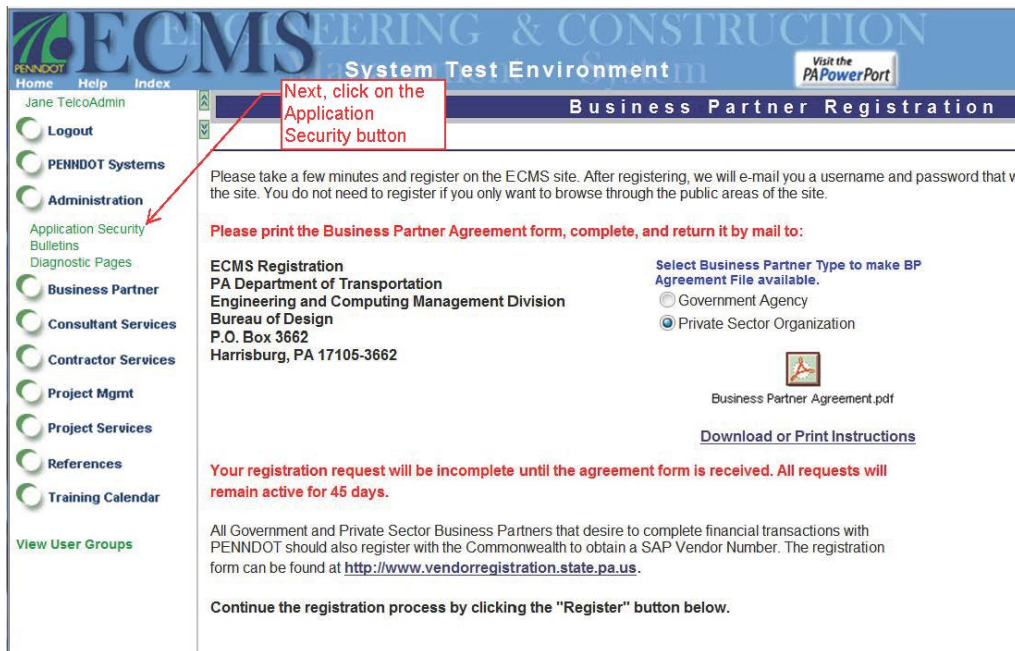


5. On this page you can change a user profile or create a new user.
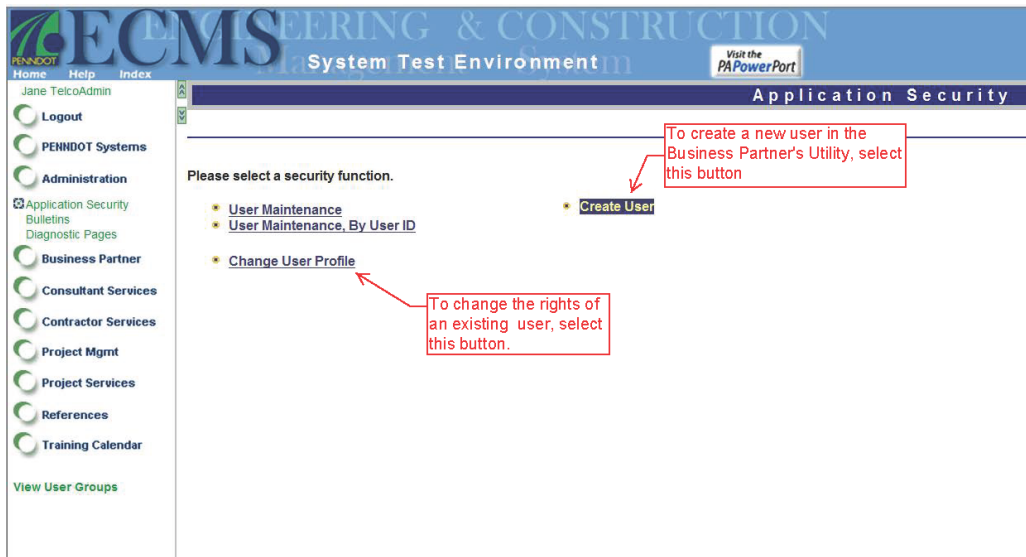
6. Click on the UREDMSBP Security Group link to select the correct user group(s).
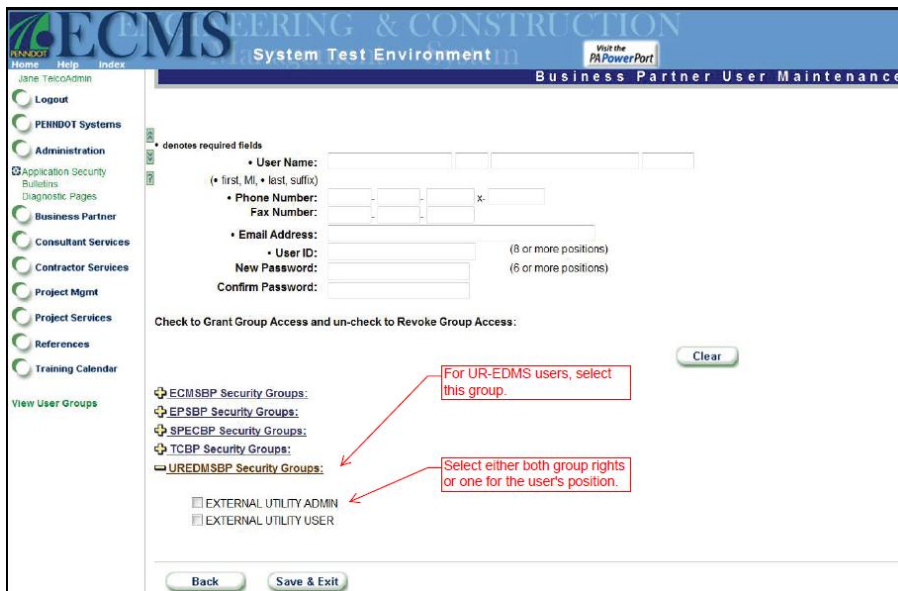


With an ECMS user ID and password, you can log onto UREDMS.

From the Home page:

1. Click the **Login** link.
   The Login Page displays.



| Field | Definition |
|---|---|
| **User Id** | Assigned User Name |
| **Password** | Enter the case-sensitive password (*Asterisks appear when typed*) |

2. Enter your login information and click **Login**.
   The External Web Interface home page appears.

**Utility Relocation - Electronic Document Management System**

Logout

Home

**User: TelcoAdmin, Jane**                                                                                    **Utility: Telco Company**

**Did You Know?**

- In order to take advantage of the many benefits of doing business electronically with PennDOT, Utility Companies must use UR-EDMS. Some of the key benefits are:
    - saves time and money
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Top

This site is best viewed with Internet Explorer 6.0/SP1 and a screen resolution of 1024x768

**Projects**
Current Projects
Completed Projects
Historical Projects

**Links**
Home
UREDMS Help
UR Contact List
ECMS Registration
eBidding
PennDOT Home
UREDMS ETraining

# Logging Out of the External Web Interface

When you log out of the External Web Interface, you also log out of ECMS.

You are automatically logged out after 30 minutes of inactivity.

Simply closing the Internet Explorer window may not log you out of UREDMS if other Internet Explorer windows remain open.

To log out of the UREDMS External Web Interface:

1. From the *EDMS* home page, click **Logout** to log off EDMS. The External Web Interface Home Page appears.
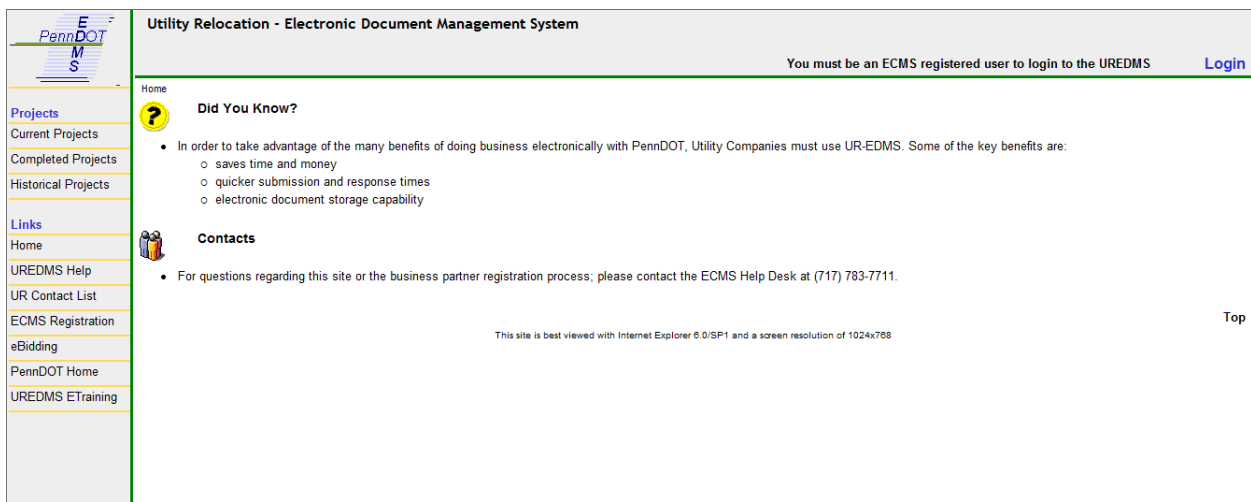


2. Click ⨯ to close Internet Explorer.

# Notifications from PennDOT

You will receive e-mail notifications from PennDOT when:

- new projects are added (to the primary contact).
- project-level documents are added to a project (to the primary contact).
    - Ex: Plans, HOP-UR, NTP, Proposed Agreements, Executed Agreements
- a project requires your attention (the project).

A sample notification follows:



If you are not logged in, clicking the link will bring up the Login page. Logging in will take you to one of the following pages depending on the document referenced in the e-mail:

- **Current Projects screen** – for project level documents (those that apply to more than one utility on a project)
- **Current Project Details screen** – for utility level documents that apply only to your utility or municipality)

If you are already logged in, clicking the link will take you directly to the appropriate page.

# Navigating the External Web Interface

This section describes how to move from screen to screen in the UREDMS External Web interface.

## Navigation Bar

The navigation bar appears on all screens. Clicking the PennDOT EDMS Logo returns you to the Home Page.
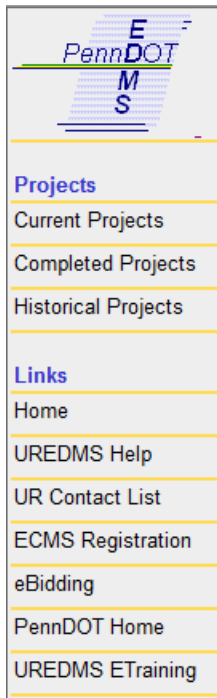


### Projects

**Current Projects -** Click to access the Current Projects screen. Clicking this link while not logged in displays the Login screen.

**Completed Projects -** Click to access the Completed Projects screen. Clicking this link while not logged in displays the Login screen.

**Historical Projects -** Click to access the Historical Projects screen. Clicking this link while not logged in displays the Login screen.

### Links

**Home -** Link to the UREDMS External Web Interface Home Page

**UREDMS Help -** Link to UREDMS Help. Help opens in a separate browser window.

**ECMS Registration -** Link to PennDOT's ECMS Business Partner Registration page.

**eBidding  -** Link to PennDOT's ECMS eBidding page.

**PennDOT Home -** Link to PennDOT's Internet home page.

UREDMS ETraining – Link to a training video that goes through how to use the system.

## Breadcrumbs

"Breadcrumbs" show you where you are in UREDMS. They appear circled in the following illustration:
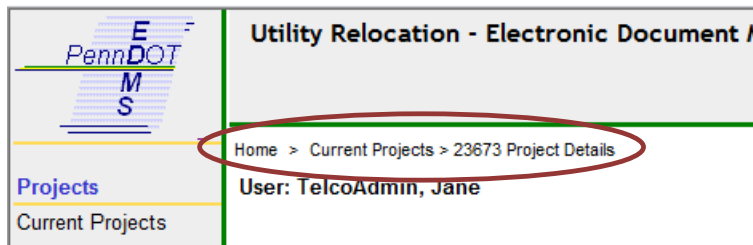


Click on any part of the trail to go to that screen.

For example, if the breadcrumbs display:
**Home  > Current Projects > 123 Project Details**
The current page is on the end of the breadcrumbs (the Current Project Details screen for Project 123).

Clicking **Current Projects** takes you to the Current Projects screen. Clicking **Home** takes you to the Home page.

# Exercise 1: Login and Navigation

| # | Step | Result |
|---|------|--------|
| 1. | Open a web browser and type in the PennDOT UREDMS URL (https://www.dotdev15.state.pa.us/uredmsweb). | The UREDMS Home Page screen displays. |
| 2. | Click the **Login** link | The "Login Page" displays. |
| 3. | Enter your assigned UserID as the Login Name & enter "Password," then click the **Login** button. | The "UREDMS Home Page" displays in a logged-in state. |
| 4. | Click the **Current Projects** link on the navigation list. | The Login Page displays. |
| 5. | Click the Links on the left side of the screen. | |
| 6. | To close the PennDOT Internet Home Page and click the **Logout** link on the "UREDMS Home Page." | The Home Page displays with **Login** appearing in the upper right corner. |

# 2 ACCESSING THE UREDMS HELP SYSTEM

Use the UREDMS Help system to obtain step-by-step procedures and conceptual information to guide you through the functionality of the UREDMS application. When accessed, UREDMS Help appears in a separate browser window.

Access the UREDMS Help system from the Help link on the Navigation bar.

1.  Click **UREDMS Help** in the navigation bar.

    UREDMS External Web Interface Help opens in a new window.
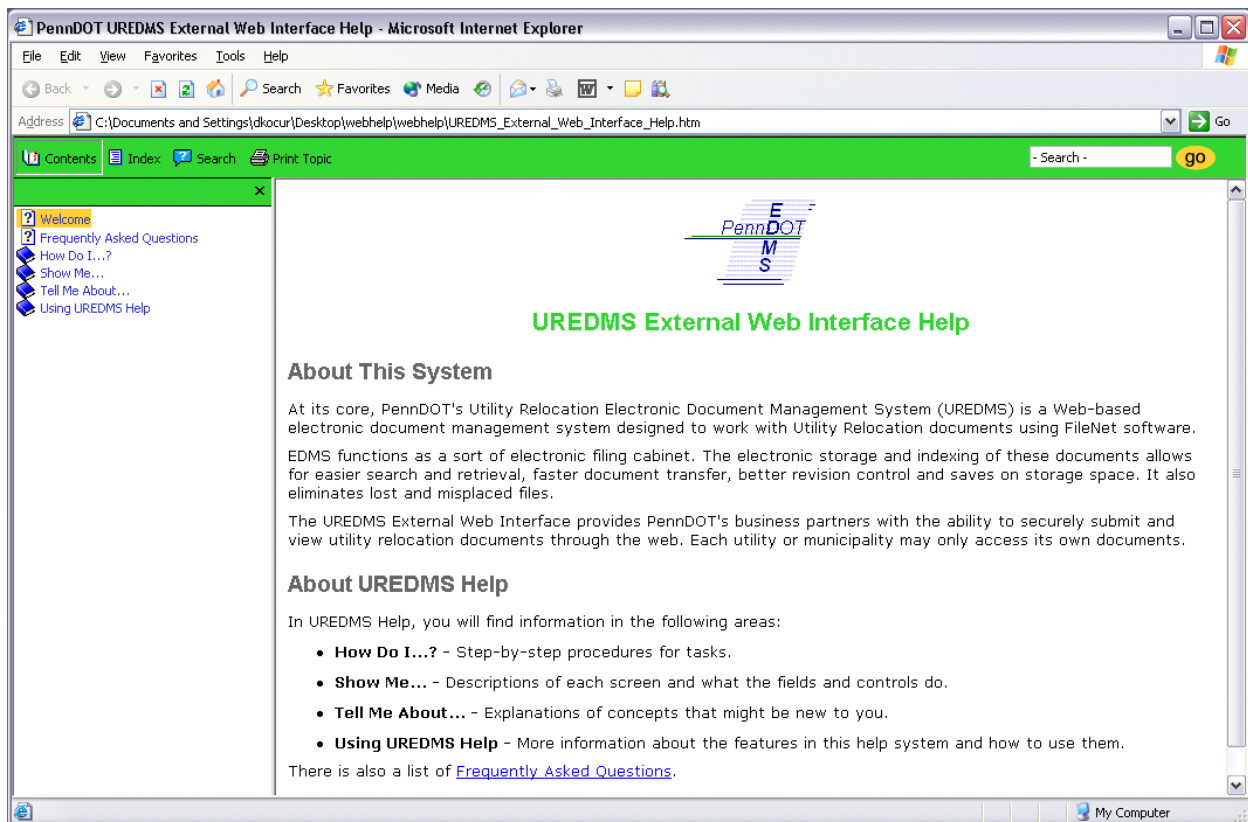
# Finding Information
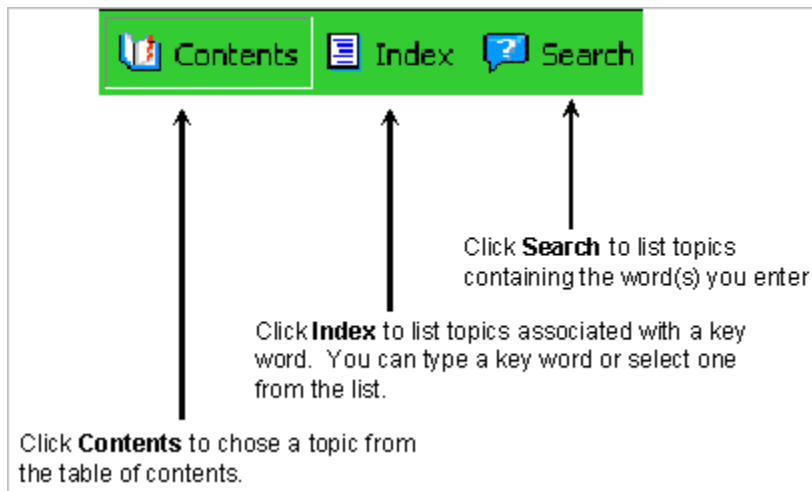


## Using the Table of Contents



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# Navigating Help Topics

Topics in the Help systems include a variety of navigation components including:

**Related Topics Buttons**

When you click a *Related Topics* button (located at the bottom a topic description), a pop-up menu opens displaying a list of topics you can access. The topics are relevant to what you are currently reading in the right-hand pane, or they cross-reference related information. When you click a topic from the pop-up menu, it opens in the right-hand pane.

**Drop-Down Hotspot Text**

Many topics include [dropdown hotspot text](). This is clickable text that displays more information below the hotspot. Click the hotspot you want to read. To close the text, click the hotspot again.
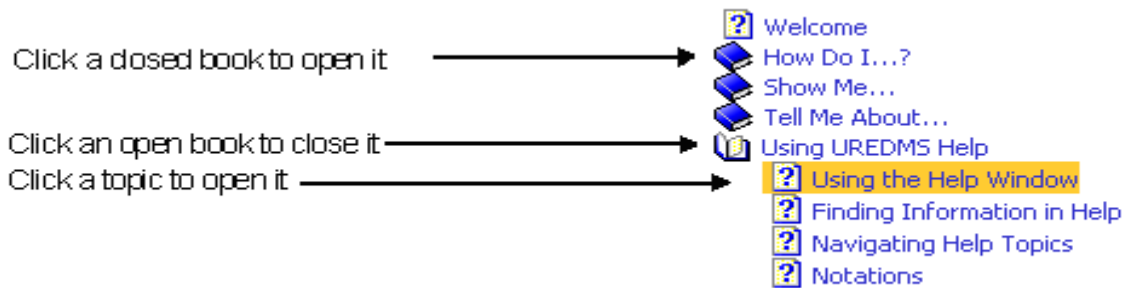
**Pop-ups**

When you click some links, the destination topic opens in a pop-up inside the same window that is open. It is like having two windows in one, only the focus is on the information in the pop-up. When you finish reading the information in the pop-up, click inside the pop-up to close it or navigate to any of its links.

**Hyperlinks**

When you click hyperlinks, the destination topic opens in the right hand pane. When you finish reading the information, you can link to another topic through the Table of Contents or click your browser's **Back** button to return to the previous topic.

## Notations

The Help system contains color-coded notations to provide additional information about the topics where they appear.

*Note* (denoted by the color blue) — This notation indicates a special note associated with the related text. This note may be a reminder or provide some additional useful information regarding the current topic.

*Tip* (denoted by the color green)—This notation indicates a hint, which provides some additional information about the current topic that can help you complete a task or points you to a helpful source.

*Caution* (denoted by the color pink)—This notation indicates that you must be cautious or carefully consider an action before you make a commitment.

# Using the Help Window

## Resizing the Help Window

When viewing Help, you can maximize the Help window or resize it. The buttons for changing the window size are located in the upper-right corner.

- To minimize the window, click  (Minimize) to shrink the window so it appears in the Taskbar on the bottom of the Windows desktop. Right-click this button and select **Restore** to display the window.

- To maximize the window, click ▫ (Maximize) to maximize the window so it occupies the entire desktop area.

- To restore the window to its default size, click ▣ (Restore).

- To resize the window manually, place the pointer over the horizontal or vertical edge of the window so it turns into a line with arrows on each end ↔ . Press the left mouse button and drag up, down, left or right. The window is resized after you release the mouse button.

## Navigating Help

Help opens in a Web browser, which includes **Back** and **Forward** buttons for navigating Help topics.

- To return to the previously viewed topic, click **Back**.

- To return to the topic displayed prior to clicking back, click **Forward**.

## Opening and Closing the Left-Hand Pane

You can close the left-hand pane of the Help window to view more of the Help text and reopen it to facilitate navigation.

- To close the left-hand pane, click ✖ at the top right of the pane

- To open the left-hand pane, click on one of the tabs (Contents, Index, Search).

## Printing Help Topics

You can print individual Help topics, if necessary.

- To print an individual Help topic, click **Print Topic** or right-click in the right-hand (topic) pane and select **Print** from the menu

  - On the *Print* window, select the printer and click **Print**

- To print an individual UREDMS Help topic using the browser toolbar, click **File** and select **Print** from the menu or right-click in the right-hand (topic) pane and select **Print** from the menu

  - On the *Print* window, select the printer and click **Print**

# Exercise 2: Using Help

| # | Step | Result |
|---|------|--------|
| 1. | From the UREDMS homepage, click the **UREDMS Help** link | "UREDMS Help" displays in a separate window. |
| 2. | Click ⬜ to maximize the Help window. | The Help window occupies the entire desktop area |
| 3. | Click **Show Me…** in the table of contents. | A list of topics appears below "Show Me…" |
| 4. | Click **Login Page**. | The "Login Page" topic appears. |
| 5. | Click the **Home Page** | The "Home Page" topic appears. |
| 6. | Scroll down and click the **Related Topics** button. | A menu of choices appears. |
| 7. | Select **Logging into UREDMS**. | The "Logging into UREDMS" topic appears. |
| 8. | Click the **Search** button in the upper left. | The Contents pane is replaced by the **Search** pane. |
| 9. | Enter "versions" in the **Type in the word(s) to search for:** field and click **Go**. | A list of topics appears. |
| 10. | Click the Document **Versions** link in the list. | The **Versions** topic appears. |
| 11. | Click the "X" on the upper right of the UREDMS Help window. | The UREDMS Help window closes. |

# Understanding Projects

There are three types of projects:

- **Current –** Current projects are those that the utility or municipality is still working on. These projects can be updated. You can move current projects to the completed list at any time.

- **Completed –** Completed projects are those that the utility or municipality has finished work on. Although the projects are read only and cannot be updated, you can move completed projects to the current projects list at any time.

- **Historical –** Historical projects are those that predate UREDMS Phase 3 or the utility's participation in it. These projects do not have packages associated with them, only individual files. Historical projects are read only and cannot be moved to either the current or completed list.

# Searching and Viewing Projects

## Searching Current Projects

When you first access the Current Projects screen, it displays a list of projects. You can filter these by criteria and sort them by County, SR & Section, utility type, or MPMS #.

To search current projects:

1. Click the **Current Projects** link in the left side of the screen.
   The Current Projects screen displays.



2. Enter your desired search criteria.

| Field | Definition |
|-------|-----------|
| **County** | The dropdown list of counties. Select one county to search for, or select "All" to include all counties in the search. |
| **Type** | The categories of service your utility/municipality provides. |
| **List by** | This dropdown allows you to specify in what order the search results will be listed. Options include: County, SR & Section, type or MPMS #. <br><br> **NOTE**: If results are already displayed, they will not be sorted until you click the **Search** button. |
| **State Route** | Enter the State Route |
| **MPMS #** | Enter the MPMS # |

3. Click the **Search** button. A list of results matching the criteria displays.

4. Use the **Next** and **Last** buttons to page through results as needed.

## Searching Completed Projects

When you access the Completed Projects screen, it shows no projects. You must search for specific criteria. You can also sort results by County, SR & Section, utility type, or MPMS #.

To search completed projects:

1. Click the **Completed Projects** link in the left side of the screen. The Completed Projects screen displays.

2. Enter your desired search criteria.

| Field | Definition |
|---|---|
| **County** | The dropdown list of counties. Select one county or select All to include all counties in the search. |
| **Type** | The category of service the utility provides. |
| **MPMS # (exact)** | For highway projects, the PennDOT assigned unique control number assigned in MPMS to identify a distinct transportation project. |
| **Utility company ID # (wildcard)** | The utility/municipality assigned identification number for the project. |
| **Initial contact date (from)** | Date the District Utility Unit first contacted the utility regarding the project. |
| **Initial contact date (to)** | Date the District Utility Unit first contacted the utility regarding the project. |
| **List by** | This dropdown allows you to specify in what order the search results will be listed. Options include: County, SR & Section, type or MPMS #. <br><br>**NOTE**: If results are already displayed, they will not be sorted until you click the **Search** button. |

3. Click the **Search** button. A list of results matching the criteria displays.



4. Use the **Next** and **Last** buttons to page through results as needed.

# Viewing and Updating Current Project Details

You can use the UREDMS External Web interface to view and update project information for current projects.

From the Current Projects screen:



Click on a project's MPMS number to display the Project Details screen.

The Current Project Details screen displays.

The Current Project Details screen shows information about the project, including:

| Field | Definition |
|-------|-----------|
| **County** | Name of the county. |
| **SR & Section** | Code indicating the portion of the state route where the project is located. |
| **Vendor ID** | The utility's ID number in PennDOT's SAP financial system. |
| **Federal ID** | The utility's federal tax ID number. |
| **Permit #** | The unique control number assigned to the latest UR Highway Occupancy Permit. |
| **Issuance date** | Date the permit number is created. |
| **Agreement #** | Unique number that identifies the latest agreement issued. |
| **Executed date** | Date the agreement was executed. |
| **Primary Contact** | The individual assigned by your municipality or utility to be the first point of contact. |
| **Description** | This section includes a brief description of this project. |

You can change the following project details:

| Field | Definition |
|-------|-----------|
| **Utility company ID #** | The utility/municipality assigned identification number for the project. |
| **Physical work started** | Date the utility began physical work on this project. |
| **Physical work completed** | Date the utility completed physical work on this project. |
| **Utility company affected?** | A checkmark in this box indicates the utility is not affected by this project. |

To update project details, type the information in the fields and click the **Update** button to save the changes.

From this screen, you can also view project documents and packages related to the project.

---

# Viewing Completed Project Details

You can use the UREDMS External Web interface to view project information for completed projects.

From the Completed Projects screen:



Click on a project's MPMS number to display the Completed Project Details screen.



The Completed Project Details screen is similar to the Current Project Details screen, except the data is read only. You cannot update the details.

Although you cannot modify the information, you can move the project to the Current projects list if you need to update it.

You can view project documents and packages related to the project as well.

# Moving a Current Project to the Completed Project List

When your utility or municipality had completed a project, you may move it to the Completed Projects list.

From the Home page:

1. Click the **Current Projects** link. The Current Projects page appears.



2. Perform a search for the project you want to work on.

3. Click the MPMS number of the project you want to move. The Current Project Details page appears.



4. Click the **Move this project to completed list of projects** link.
The system moves the project to the Completed Projects list and the Completed Projects page displays.

---

# Moving a Completed Project to the Current Project List

Completed projects are read-only and cannot be changed. If you must make changes to a completed project, you may move it to the Current Projects list.

From the Home page:

1. Click the **Completed Projects** link.
   The Completed Projects page appears.
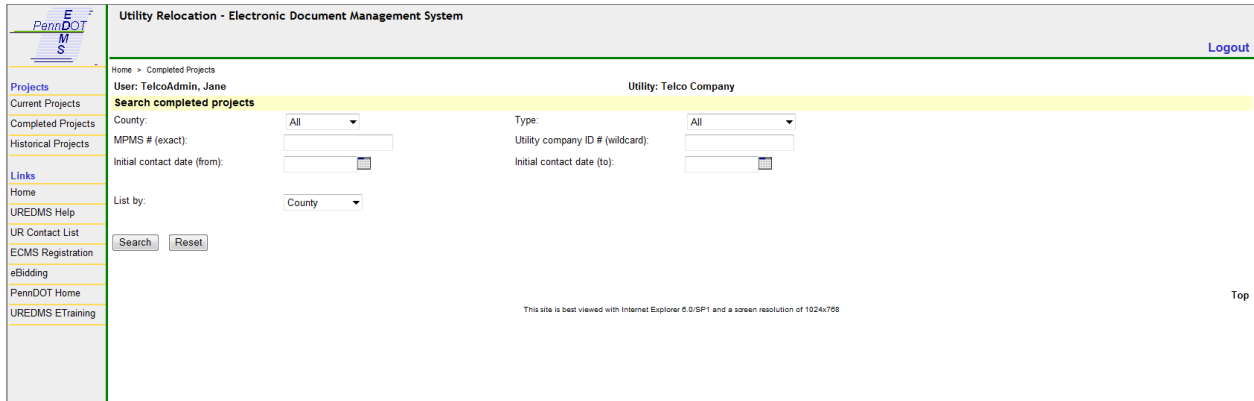


2. Perform a search for the project you want to work on.
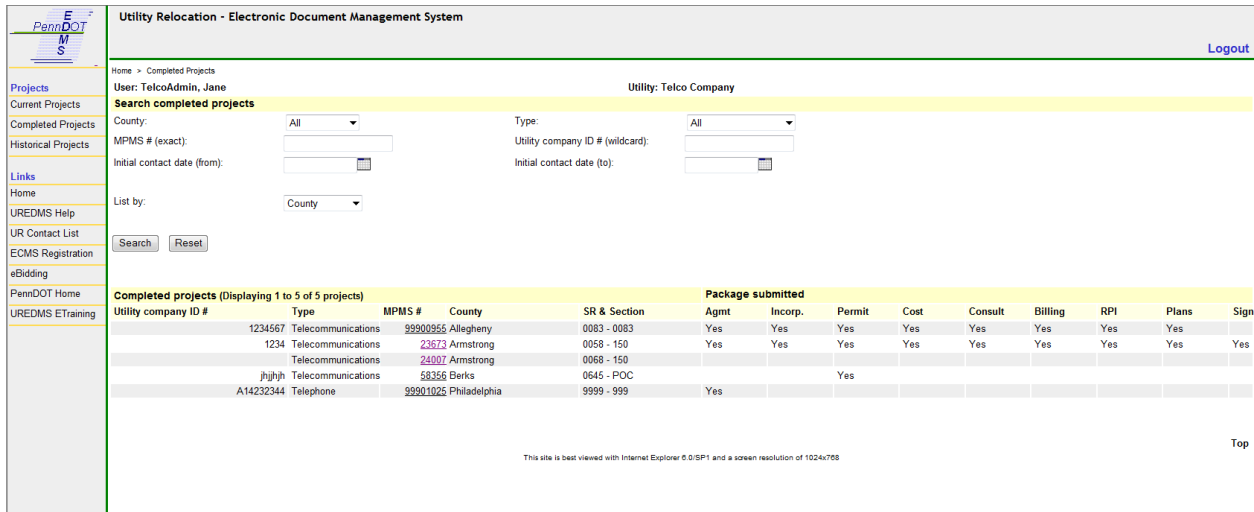


3. Click the MPMS number of the project you want to move.
   The Completed Project Details page appears.

E
PennDOT
M
S

Home > Completed Projects > 23673 Project Details

**Projects**
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**Links**
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eBidding
PennDOT Home
UREDMS ETraining

**User: TelcoAdmin, Jane**                                          **Utility: Telco Company**                                          Documents | Packages

**23673 - Foxburg Bridge**

| | | | |
|---|---|---|---|
| County: | Armstrong | SR & Section: | 0058 - 150 |
| Vendor ID: | | Federal ID: | 333332121 |
| Permit # : | | Issuance date: | |
| Agreement # : | | Executed date: | |
| Primary Contact: | Jane TelcoAdmin | Description: | Bridge replacement on new alignment and minimum approach roadway work. |

| **Utility inputs** | | **PennDOT inputs** | |
|---|---|---|---|
| Utility company ID # : | 1234 | Preliminary Engineering authorized: | 04/10/2008 |
| Physical work started: | 04/18/2008 | Authorization to proceed: | |
| Physical work completed: | 10/20/2008 | LetDate(Actual): | 12/21/2006 |
| Utility not affected ? : | ☑ Yes, not affected | AssignedTo: | urd10a |

**Project contact**

| **Name** | **Phone** | **E-mail** |
|---|---|---|
| TelcoAdmin, Jane | (999)999-9999 | rverbos@state.pa.us |

**Move project to current list**
Move this project to current list of projects

4. Click the **Move this project to current list of projects** link.
   The system moves the project to the Current Projects list and the Current Project Details page displays.

## Exercise 3: Search Current Projects, Update Project Details & Move Current Project to Completed List

| # | Step | Result |
|---|------|--------|
| 1. | From the UREDMS homepage, click the Current Projects | |
| 2. | Select to filter by "All." Click the "Search" button. | All projects will display. |
| 3. | Select to list by "SR & Section." Click the "Search" button. | The projects will be sorted in the list by "SR & Section." |
| 4. | Select to list by "MPMS#." Click the "Search" button. | The projects will be sorted in the list by "MPMS#." |
| 5. | Select to list by "County." Click the "Search" button. | The projects will be sorted in the list by "County." |
| 6. | Select to filter by type | |
| 7. | Select a project by clicking on the MPMS # | |
| 8. | Enter the following information: "1234567" in **Utility Company ID** "7/12/2012" in **Work Started** "1/1/2012" in **Work Completed** Then click the **Update** button. | An error message "**Work start date should not be later than Work completed date"** displays at the top of the screen. |
| 9. | Change the **Work Completed** date to "11/1/2013." Then click the **Update** button. | The error message no longer displays. |
| 10. | If you are not affected, select the **Yes: Not Affected** checkbox and click the **Update** button. | An email notification will be sent to the appropriate District Utility Administrator. |
| 11. | From the UREDMS homepage, click **Current Projects** | |
| 12. | Select a project by clicking on the MPMS #. | |
| 13. | Click the **Move this project to completed list of projects** link. | The system moves the project to the Completed Projects list. |

# Viewing Historical Projects

Historical projects are those that predate implementation and/or your utility's use of the UREDMS External Web Interface. Historical projects may not be moved to Completed projects or Current projects.

## Searching Historical Projects

You can search for historical projects by county, initial contact date range, and MPMS #.

To search historical projects:

1. Click the **Historical Projects** link in the left side of the screen.
   The Historical Projects screen displays.



2. Enter your desired search criteria.

| Field | Definition |
|-------|-----------|
| **County:** | The dropdown list of counties. Select one county to search for, or select All to include all counties in the search. |
| **MPMS # (exact)** | For highway projects, the unique control number assigned in MPMS to identify a distinct transportation project. |
| **Initial contact date (from)** | Date the District Utility Unit first contacted the utility regarding the project. |
| **Initial contact date (to)** | Date the District Utility Unit first contacted the utility regarding the project. |
| **List by** | This dropdown allows you to specify in what order the search results will be listed. Options include: County, SR & Section, type or MPMS #.<br><br>**NOTE**: If results are already displayed, they will not be sorted until you click the **Search** button. |

3. Click the **Search** button. A list of results matching the criteria displays.



4. Use the **Next** and **Last** buttons to page through results as needed.

# Opening Historical Project Documents

You can view the project details, project dates, payment information, and submitted documents.

Historical projects documents can be only viewed; they cannot be modified or deleted by any user.

From the Historical Projects screen:

1. Click the MPMS number of the project you want to view.
   The Historical Project Details screen displays.



The Historical Project Details screen shows information about the project, including:

| Field | Definition |
| --- | --- |
| **County** | Name of the Pennsylvania county. |
| **SR & Section** | Code indicating the portion of the state route where the project is located. |
| **Vendor ID** | The utility's ID number in PennDOT's SAP financial system. |
| **Federal ID** | Your utility's federal tax ID number. |
| **Permit #** | The unique control number assigned to the latest UR Highway Occupancy Permit. |
| **Issuance date** | Date the permit number is created. |

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| Field | Definition |
|---|---|
| **Agreement #** | Unique number that identifies the latest agreement issued. |
| **Executed date** | Date the agreement was executed. |
| **Primary Contact** | The individual assigned by your municipality or utility to be the first point of contact. |
| **Description** | This section includes a brief description of this project. |
| **Physical work started** | Date the utility began physical work on this project. |
| **Physical work completed** | Date the utility completed physical work on this project. |

2.  Click the number in the **View Document** column for the document you wish to view.

**NOTE**: Historical documents are not limited to PDF files. To view these documents, you may need other software for example, Microsoft Word for .doc files, Microsoft Excel for .xls files, a viewer for .tif images, etc.

**NOTE**: Sometimes you will see documents marked as "Offline Files." These are archived files and are not available to view. Contact the PennDOT ECMS Help Desk (717-783-7711) with the Item ID number (under View Document) for assistance in viewing these files.

## Understanding Packages

A document package is a group of related documents assembled into a single PDF file when it is submitted to PennDOT.

You submit individual project files organized by packages. UREDMS assembles these individual PDF files into one package document for PennDOT review.
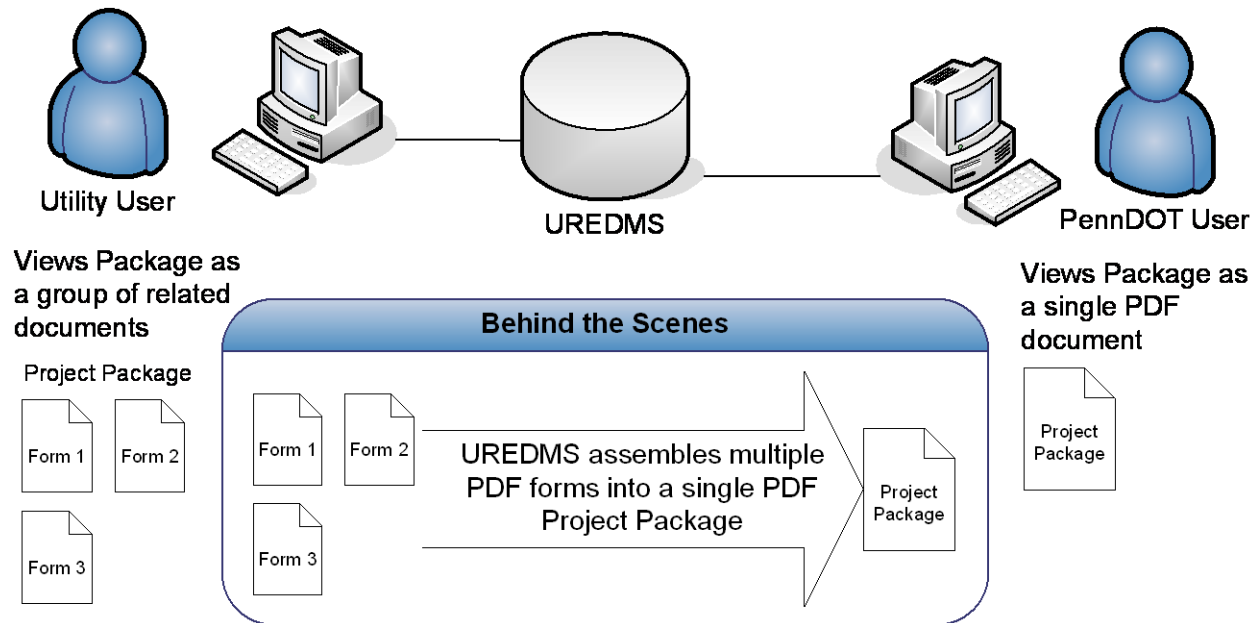


When you add or update a document, UREDMS reassembles the package.



---
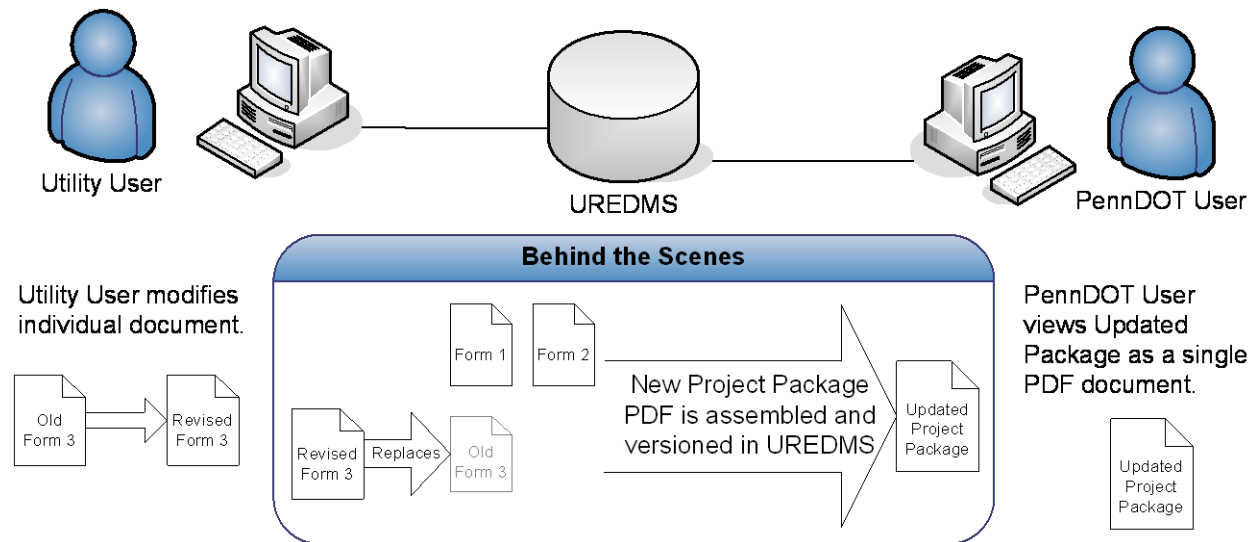
This allows utilities to update a single document instead of resubmitting every document for the entire package. PennDOT reviewers have the convenience of having only one file to review.

UREDMS retains older versions of both the package and the documents.

## Types of Packages

There are nine types of packages.

- Permit Package
- Agreement Package
- Incorporated Work Request Package
- Cost Sharing Request Package
- Consultant Request Package
- Billing Package
- Real Property Interest Package
- Plans Package
- Signed Utility Agreements

Each type of package has a list of documents. Every document has a Document Type, which determines its placement in the package.

# Downloading Forms

Before you work on a package, you can download a PDF version of the forms. Once downloaded, you can either save it or open it and then save it. Forms downloaded from UREDMS include a project header which displays project information including MPMS Number and SR and Section.

To download a form from the Current Project Details screen:

1. Click the **Go to forms** link in the desired Project Package row.
   The Download Forms screen displays. This screen lists package documents available for download.

| | |
|---|---|
| **PennDOT** E M S | **Utility Relocation - Electronic Document Management System** |
| | Logout |
| | Home > Current Projects > 23673 Project Details > Download Agreement Package Forms |
| Projects | User: TelcoAdmin, Jane                                   Utility: Telco Company |
| Current Projects | **Agreement package** |
| Completed Projects | Agreement documents |
| Historical Projects | |
| | **Standard forms**                                                  **Download** |
| Links | Utility Relocation Cover Letter                                      Download |
| Home | 4181A - Prelim. Estimate for Utility Relocation                      Download |
| UREDMS Help | 4181UC - Clearance Status Report                                     Download |
| UR Contact List | 4181 - Utility Relocation Questionnaire and Permit Application       Download |
| ECMS Registration | 4181IC - Certification of Utility Inspection                        Download |
| eBidding | |
| PennDOT Home | 23673 Project Details |
| UREDMS ETraining | Top |
| | This site is best viewed with Internet Explorer 6.0/SP1 and a screen resolution of 1024x768 |

2. Click the Download link for the form you want to download. The "File Download" dialog box opens.
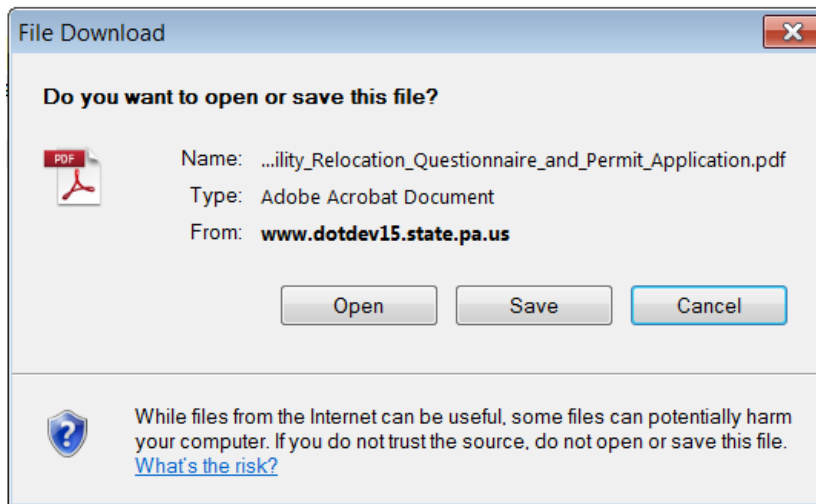


3. a. Click Save. The "Save As" dialog box opens. Go to Step 4.

OR

b. Click Open to open the form.
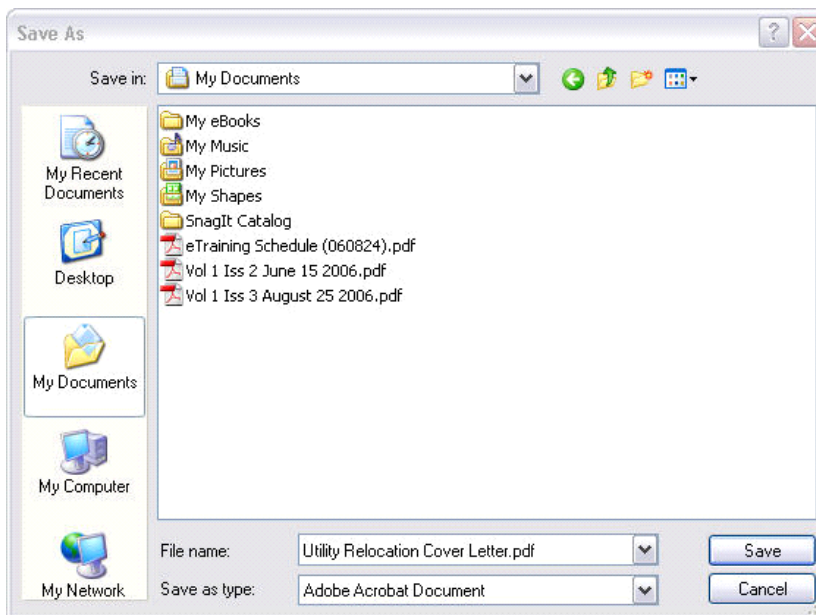


4. Navigate to the desired location in the local file system, and click the **Save** button. The form is saved to the selected location. The "Save As" dialog box closes.

# Exercise 4: Downloading Forms

| # | Step | Result |
|---|------|--------|
| 1. | From the UREDMS hompage, select "Current Projects". | |
| 2. | Select a project by clicking on the MPMS #. | |
| 3. | Select the "Go To Forms" link on the "Permit Package" line. | "Download Permit Package Forms" Page displays |
| 4. | Click the "Download" link for "4181UC - Clearance Status Report" form. | "File Download" window displays. |
| 5. | Click the "Save" Button | "Save As" window displays |
| 6. | Click the "Save" Button | The "4181UC - Clearance Status Report" form downloads to the local machine  The "Download Permit Package Forms" page is active. |
| 7. | Click the "Download" link for "4181 - Utility Relocation Questionnaire and Permit Application" form. | A "File Download" window displays. |
| 8. | Click the "Save" Button | A "Save As" window displays |
| 9. | Click the "Save" Button | The "4181 - Utility Relocation Questionnaire and Permit Application" form downloads to the local machine.  The "Download Permit Package Forms" page is active. |
| 10. | Open the downloaded "4181 - Utility Relocation Questionnaire and Permit Application" form. | The MPMS number appears in the header. |
| 11. | Click the "View Project Details" link | The "Project Details" page for the project displays. |

# Submitting a New Package

Before submitting a package, make sure you have all of the required forms filled out along with any supporting documentation you wish to add.

**CAUTION**: All documents you submit must be in PDF format.

1. Click the **Current Projects** link.
   The Current Projects screen displays.



2. Perform a search for the project you want to work on.

3. Click the MPMS number of the project you want to work on.
   The Current Project Details screen appears.

Logout

**User: TelcoAdmin, Jane**                                      **Utility: Telco Company**                                      Documents | Packages

**23673 - Foxburg Bridge**

| | | | |
|---|---|---|---|
| County: | Armstrong | SR & Section: | 0058 - 150 |
| Vendor ID: | | Federal ID: | 333332121 |
| Permit # : | | Issuance date: | |
| Agreement # : | | Executed date: | |
| Primary Contact: | Jane TelcoAdmin | Description: | Bridge replacement on new alignment and minimum approach roadway work. |

**Projects**
Current Projects
Completed Projects
Historical Projects

**Links**
Home
UREDMS Help
UR Contact List
ECMS Registration
eBidding
PennDOT Home
UREDMS ETraining

**Utility inputs**

| | | **PennDOT inputs** | |
|---|---|---|---|
| Utility company ID # : | | Preliminary Engineering authorized: | 04/10/2008 |
| Physical work started: | | Authorization to proceed: | |
| Physical work completed: | | LetDate(Actual): | 12/21/2006 |
| Utility not affected ? : | ☐ Yes, not affected | AssignedTo: | |

Note:If selected Please enter the facility location details in Comments.

Comments:

[ Update ]

**Project contact**

| Name | Phone | E-mail | Re-assign |
|---|---|---|---|
| Jane TelcoAdmin | 7177835980 | rverbos@state.pa.us | Re-assign to another contact |

**Move project to completed list**
Move this project to completed list of projects

Top

**PennDOT project documents (view only)**

⚠ **No documents found**

**Utility packages**

| Package type | Status | Submitted by | Original submission date | Download forms | Submit package | Date notification sent to utility |
|---|---|---|---|---|---|---|
| Agreement package | Submitted | TelcoAdmin, Jane | 06/15/2012 10:18:30 AM | Go to forms | | |
| Incorp. work request package | Not submitted | | | Go to forms | Submit | |
| Permit package | Not submitted | | | Go to forms | Submit | |
| Cost sharing package | Not submitted | | | Go to forms | Submit | |
| Consultant request package | Not submitted | | | Go to forms | Submit | |
| Billing package | Not submitted | | | Go to forms | Submit | |
| Real property interest package | Not submitted | | | Go to forms | Submit | |
| Plans package | Not submitted | | | | Submit | |
| Signed Utility Agreements | Submitted | TelcoAdmin, Jane | 07/27/2012 01:37:32 PM | | | |

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This site is best viewed with Internet Explorer 6.0/SP1 and a screen resolution of 1024x768

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Logout

**User: TelcoAdmin, Jane**                                      **Utility: Telco Company**

**Select documents for Incorp. work request package**

| Document type | File |
|---|---|
| Utility Relocation Cover Letter | [ Browse... ] |

Note1: Only PDF documents can be submitted.
Note2: Maximum of 30MB is allowed for assembled package.

**Projects**
Current Projects
Completed Projects
Historical Projects

**Links**
Home
UREDMS Help
UR Contact List
ECMS Registration
eBidding
PennDOT Home
UREDMS ETraining

[ Add documents ]

**Submit Incorp. work request package**

Comments to PennDOT:

[ Submit ]  [ Cancel ]

4. Click the **Submit** link for the package you want to submit.
The Submit Package screen displays.

Utility Relocation - Electronic Document Management System

Logout

Home > Current Projects > 23673 Project Details > Download Agreement Package Forms

| | |
|---|---|
| User: TelcoAdmin, Jane | Utility: Telco Company |

**Select documents for Incorp. work request package**
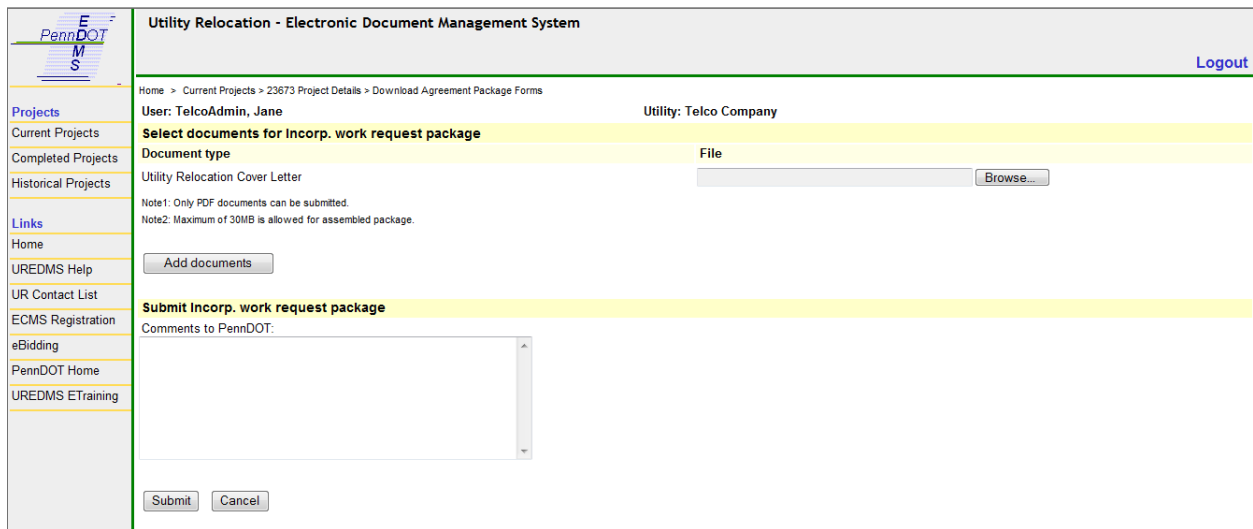
| Document type | File |
|---|---|
| Utility Relocation Cover Letter | [                    ] Browse... |

Note1: Only PDF documents can be submitted.
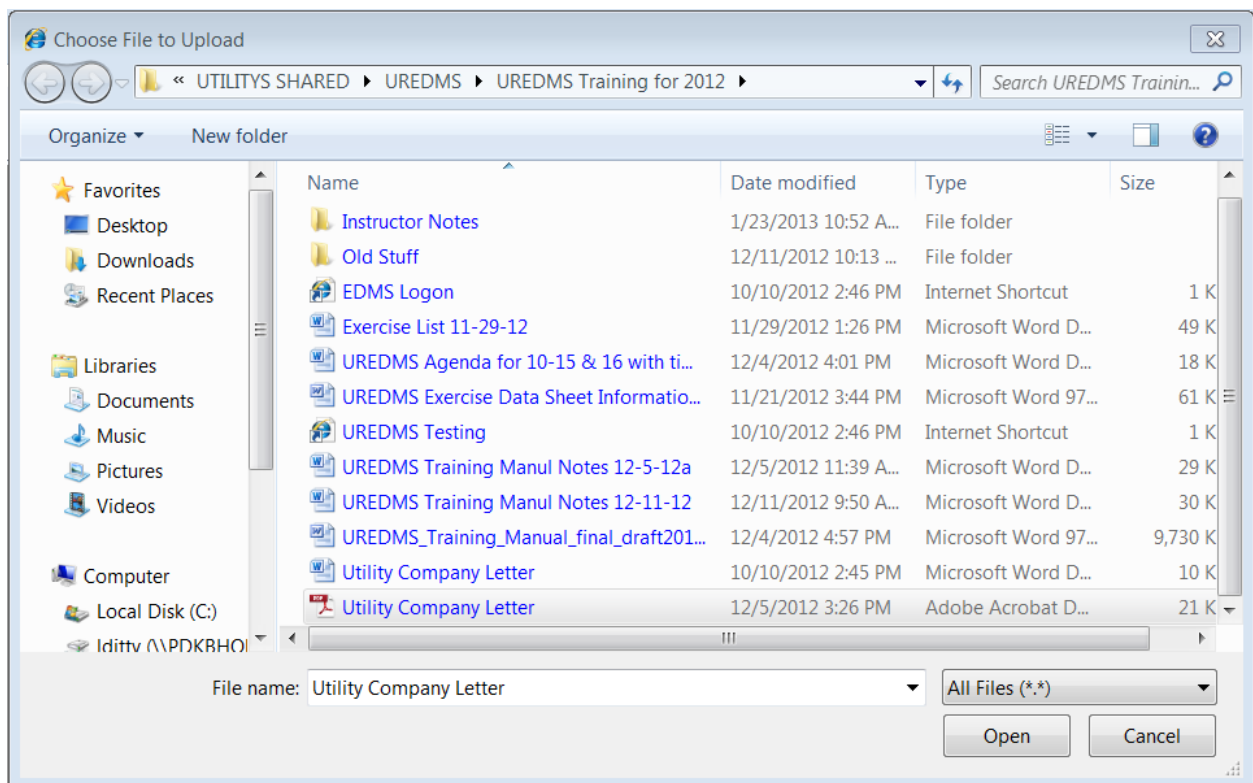Note2: Maximum of 30MB is allowed for assembled package.

Add documents

**Submit Incorp. work request package**

Comments to PennDOT:

Submit    Cancel

Projects
Current Projects
Completed Projects
Historical Projects

Links
Home
UREDMS Help
UR Contact List
ECMS Registration
eBidding
PennDOT Home
UREDMS ETraining

5. Next to a form, click the **Browse…** button.
   A Choose File dialog box appears.



6. Navigate to the PDF file and select it.

7. Click the **Open** button.
The file name and path appear in the **File** field.



TIP: If you have added a file path by mistake, delete the entire text from the File field.

8. If wanted, click the **Add documents** button to insert another document. A new row is added.

9. Select a **Document Type** for the file.

10. Repeat steps 5-8 for the file.

11. Enter any remarks in the **Comments to PennDOT:** field.

12. Click the **Submit** button to submit the package to PennDOT.

# Exercise 5: Submitting a New Package

This exercise continues from the previous exercise.

| # | Step | Result |
|---|------|--------|
| 1. | Select the "Submit" link for the "Permit Package" | "Submit Permit Package" screen displays. |
| 2. | Click the "Browse" button next to the "4181 - Utility Relocation Questionnaire and Permit Application" document type field. | A windows file chooser displays. |
| 3. | Select "4181 - Utility Relocation Questionnaire and Permit Application" document from file system. | Path and filename of the "4181 - Utility Relocation Questionnaire and Permit Application" is populated into the "4181 - Utility Relocation Questionnaire and Permit Application" field. |
| 4. | Click the **Browse** button next to the "4181UC - Clearance Status Report" document type field. | A windows file chooser displays. |
| 5. | Select "4181UC - Clearance Status Report" document from file system. | The path and filename appears in the "4181UC - Clearance Status Report" field. |
| 6. | Click **Add Documents.** | A new line displays. |
| 7. | Choose "Attachments" from the dropdown. | |
| 8. | Click the **Browse** button next to the "Attachments" document type field. | A windows file chooser displays. |
| 9. | Select "4181UC - Clearance Status Report" document from file system. | The path and filename appears in the "4181UC - Clearance Status Report" field. |
| 10. | Enter text into the **Comments** Field and click the **Submit** button. | The files are uploaded and the Project Details page displays. **Status** on utility Permit package is changed to "Submitted" with **Submitted by** changed to your Training User ID. |

# Updating a Submitted Package

There are three ways to modify a submitted package:

- Add one or more documents

- Update an existing document

- Delete an existing document

If you want to update or delete a document in a package, you do not have to resubmit the entire package. You only work with that document.

**TIP**: You can delete an entire package by deleting all of its documents.

To update a submitted package:

1. Click the **Current Projects** link.
   The Current Projects screen displays.



| | | | | | Package submitted | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Utility company ID # | Type | MPMS # | County | SR & Section | Agmt | Incorp. | Permit | Cost | Consult | Billing | RPI | Plans | Sign |
| | Telecommunications | 23673 | Armstrong | 0058 - 150 | Yes | | | | | | | | Yes |
| | Telecommunications | 24188 | Armstrong | 0066 - 130 | | Yes | | | | | | | |
| MOVE ME 2 | Telecommunications | 51032 | Armstrong | 0422 - 171 | Yes | | Yes | Yes | | | | | |
| | Telecommunications | 83212 | Armstrong | 1010 - 150 | Yes | Yes | | | | | | Yes | Yes |
| 1234789 | Cable Television | 10467 | Berks | 0078 - 17M | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | |

2. Perform a search for the project you want to work on.

3. Click the MPMS number of the project you want to work on.
   The Current Project Details screen appears.

Logout

Home > Current Projects > 23673 Project Details

| | | | |
|---|---|---|---|
| **User: TelcoAdmin, Jane** | | **Utility: Telco Company** | Documents \| Packages |

**23673 - Foxburg Bridge**

| | | | |
|---|---|---|---|
| County: | Armstrong | SR & Section: | 0058 - 150 |
| Vendor ID: | | Federal ID: | 333332121 |
| Permit # : | | Issuance date: | |
| Agreement # : | | Executed date: | |
| Primary Contact: | Jane TelcoAdmin | Description: | Bridge replacement on new alignment and minimum approach roadway work. |

**Projects**
Current Projects
Completed Projects
Historical Projects

**Links**
Home
UREDMS Help
UR Contact List
ECMS Registration
eBidding
PennDOT Home
UREDMS ETraining

**Utility inputs**

| | |
|---|---|
| Utility company ID # : | |
| Physical work started: | |
| Physical work completed: | |
| Utility not affected ? : | ☐ Yes, not affected |
| Note:If selected Please enter the facility location details in Comments. | |
| Comments: | |

Update

**PennDOT inputs**

| | |
|---|---|
| Preliminary Engineering authorized: | 04/10/2008 |
| Authorization to proceed: | |
| LetDate(Actual): | 12/21/2006 |
| AssignedTo: | |

**Project contact**

| Name | Phone | E-mail | Re-assign |
|---|---|---|---|
| Jane TelcoAdmin | 7177835980 | rverbos@state.pa.us | Re-assign to another contact |

**Move project to completed list**
Move this project to completed list of projects

Top

**PennDOT project documents (view only)**

⚠ No documents found

**Utility packages**

| Package type | Status | Submitted by | Original submission date | Download forms | Submit package | Date notification sent to utility |
|---|---|---|---|---|---|---|
| Agreement package | Submitted | TelcoAdmin, Jane | 06/15/2012 10:18:30 AM | Go to forms | | |
| Incorp. work request package | Not submitted | | | Go to forms | Submit | |
| Permit package | Not submitted | | | Go to forms | Submit | |
| Cost sharing package | Not submitted | | | Go to forms | Submit | |
| Consultant request package | Not submitted | | | Go to forms | Submit | |
| Billing package | Not submitted | | | Go to forms | Submit | |
| Real property interest package | Not submitted | | | Go to forms | Submit | |
| Plans package | Not submitted | | | | Submit | |
| Signed Utility Agreements | Submitted | TelcoAdmin, Jane | 07/27/2012 01:37:32 PM | | | |

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4. Click the **Submitted** link for the package you want to update.
The Current Package Details screen displays.

From the Current Package Details screen, you can do several things:

- Add additional documents to a package

- Update an existing document in a package

- Delete a document from a package

## Adding Documents to a Package

From the Current Package Details screen:

1. Click the **Add Documents** link.
   The Add Documents screen displays.



2. Select a **Document Type** for the file.

3. Click the **Browse…** button.
   A Choose File dialog box appears.

4. Navigate to the PDF file and select it.

5. Click the **Open** button.
   The file name and path appear in the **File** field.

6. Click the **Add documents** button to insert another document. And repeat as needed.

7. Enter any remarks in the **Comments to PennDOT:** field.

8. Click the **Submit** button to submit the updated package to PennDOT.
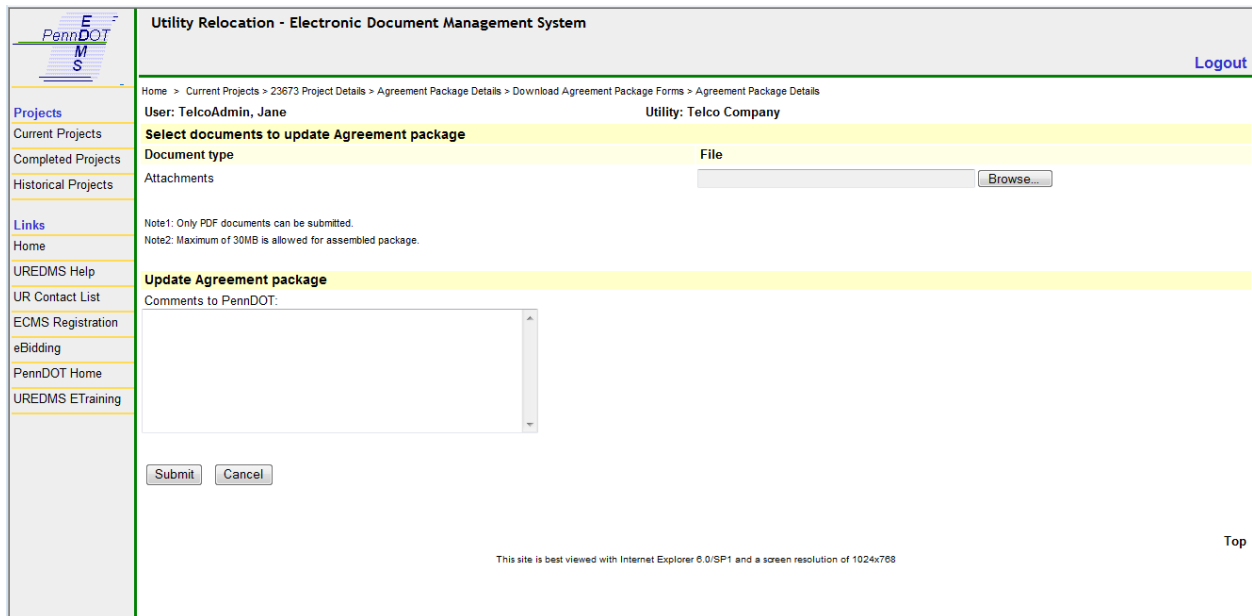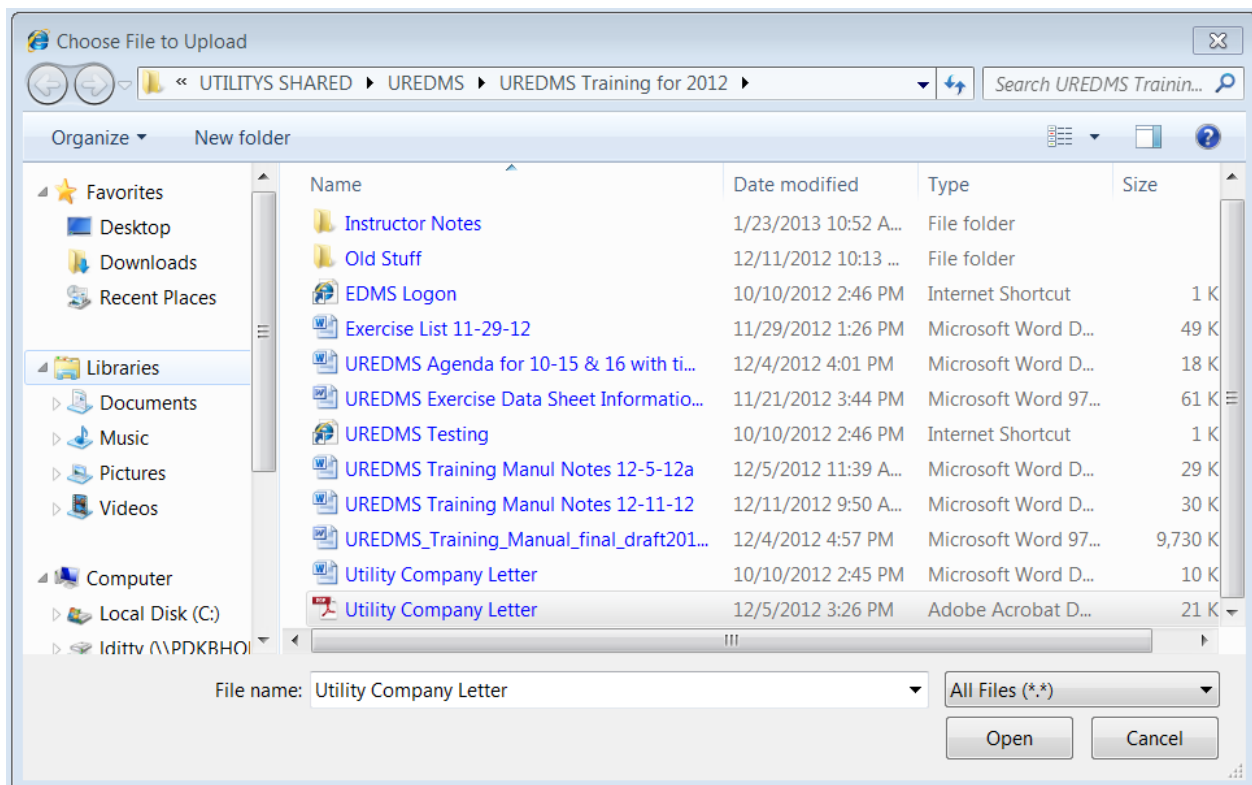
## Updating a Document in a Package

 **NOTE**: You can only update one document at a time.

From the Current Package Details screen:

1. Click the **Update** link next to the document you want to update.
   The Update Package screen displays.

---

2. Select a **Document Type** for the file.

3. Click the **Browse…** button.
   A Choose File dialog box appears.



4. Navigate to the PDF file and select it.

5.  Click the **Open** button.
    The file name and path appear in the **File** field.

6.  Enter any remarks in the **Comments to PennDOT:** field.

7.  Click the **Submit** button to submit the updated package to PennDOT.

## Deleting a Document From a Package

From the Current Package Details screen:

1.  Click the **Delete** link for the document you want to delete.
    A confirmation message appears.
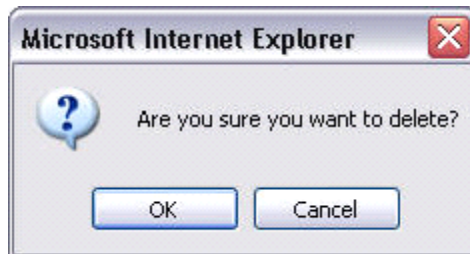


2.  Click **OK** to delete the document.

# Exercise 6: Update Package

| # | Step | Result |
|---|------|--------|
| 1. | From the UREDMS homepage, select **Current Projects.** | |
| 2. | Select the project that was used in the previous exercise by clicking on the MPMS. | |
| 3. | Click the **Submitted** link for the "Permit Package". | |
| 4. | Click the **Add Documents** link. | |
| 5. | Click the **Browse** button. | A windows file chooser displays. |
| 6. | Select "4181 - Utility Relocation Questionnaire and Permit Application UPDATED VERSION" document from file system. | The path and filename appears in the "4181 - Utility Relocation Questionnaire and Permit Application" field. |
| 7. | Enter text into the **Comments** Field and click the **Submit** button. | The file is uploaded and the "Project Details" screen displays. |

# Working with Documents

Every document has a unique ID number which appears in the View Document column.

## Viewing a Project-level Document

Project level documents from PennDOT appear in the Project Details screen (Current or Competed) under the heading "PennDOT project documents (view only)." These documents apply to all utilities on a project.

Click a document's number in the View Document column to open it in a new window.



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# Viewing a Package-level Document

From the Completed or Current Package Details screen, click a document's ID Number in the **View document** column to open it in a new window.



# Viewing a Historical Document

From the Historical Project Details screen, click a document's ID Number in the **View document** column to open it in a new window.

# Viewing a Document's Version History

When someone uploads a new version of a document, the old version is not deleted. Instead, a new version of the document is created.

Clicking the View Document link for a document will always display the current (newest) version.

If you need to access an older version of a document, you can use the Versions screen to view or copy other versions to your local hard drive.

From the Current Package Details screen or Completed Package Details screen:

1. Click the **Versions** link for a document.
   The Versions screen displays.



| Field | Definition |
|---|---|
| **Version #** | The higher the number the later the version. |
| **Modified date** | The date the version was submitted. |
| **Modified by** | The individual who submitted the version. |
| **Organization** | The organization that submitted the version. |
| **View** | Click this link to open the document. |

2. Click the **View** link for the version you want to display.
   The selected version appears in a new window.

**TIP**: You can go back to a previous version of a document.

Save the desired version to your local drive and update the package with that file.

---

# Exercise 7: View a Document Version

| # | Step | Result |
|---|------|--------|
| 1. | From the UREDMS homepage, click the **Current Projects** link. | |
| 2. | Select the project that was used in the previous exercise by clicking on the MPMS. | |
| 3. | Select the **Submitted** link for the "Permit Package" | Agreement Package Details page displays. |
| 4. | Click the **Versions** link for the "4181 - Utility Relocation Questionnaire and Permit Application" | The Versions screen displays. |
| 5. | Click the **View** link for version 1. | The document appears in a new Acrobat Reader window. |
| 6. | Close the Acrobat Reader. | |
| 7. | Click the **View** link for version 2. | The document appears in a new Acrobat Reader window. |

# Understanding Contacts

There are two types of contacts:

- **Primary -** Primary contacts are assigned by the municipality or utility to be the first point of contact for all projects.

- **Project -** Project contacts are assigned to a project by the primary contact.

| Primary Contacts... | Project Contacts... |
|---|---|
| Are maintained by PennDOT in ECMS | Are maintained in ECMS by the utility/municipality Business Partner Administrator |
| Are assigned by default when PennDOT begins a project | Are assigned by the primary contact |
| May reassign projects to other contacts or to themselves | May not reassign projects |

The primary contact receives all initial notifications regarding a project. A project contact may be assigned at any time through the Current Project Details screen. Project contacts will receive notifications regarding that project thereafter.

**NOTE**: You must be assigned to a project either as a primary or a project contact to edit it.

# Assigning a Contact to a Project

**NOTE**: Only the primary contact may re-assign a project.

From the Current Project Details screen:

1. Click the **Re-assign to another contact** link.
   The Project Contact screen displays.



2. Select a name from the **Contacts:** dropdown list.
   The selected contact's information appears under "Project contact's details."

3. Update the contact address, if necessary.

**NOTE**: You can only modify certain fields from this page. Other fields must be edited in ECMS.

4. Click the **Apply** button to assign the contact and accept any changes you made.
   The Current Project Details screen displays.

# Removing a Contact from a Project

To remove a project contact, reassign the project to yourself (the primary contact).

# Exercise 8: Project Contact

| # | Step | Result |
|---|------|--------|
| 1. | From the UREDMS homepage, click on the Current Projects link. | |
| 2. | Select a project by clicking the MPMS #. | |
| 3. | Select "Reassign to Another Contact" link. | "Project Contact" page displays. |
| 4. | Select a different contact name | The contact information changes. |
| 5. | Add "Suite 200" to the second address field. Click the "Apply" button. | The "Project Details" screen displays. The "Project Contact" is now changed. |
| 6. | Select "Reassign to Another Contact" link. | "Project Contact" page displays. Second line of the address is still "Suite 200" |
| 7. | Delete "Suite 200" (leave field blank) | |
| 8. | Click the "Cancel" button | "Project Details" page displays. |
| 9. | Select the "Reassign to Another Contact" link. | "Project Contact" page displays. Second line of "TelcoAdmin, Jane" address is still "Suite 200" |
| 10. | Select Your training user ID in the contacts dropdown. | The contact information changes. |
| 11. | Click the "Apply" button. | "Project Details" page displays. Your Training User ID is listed as the project contact. |

# 6 APPENDIX – PDF GUIDELINES

The following are guidelines for submitting PDF files through the UREDMS:

- Only PDF documents are accepted into the PennDOT UREDMS Web.

- All fonts should be embedded. PDF font embedding must be specified to the PDF distiller or writer to ensure that all fonts are included in the document.

- PDF output resolution from the PDF distiller or writer should be set to at least 300 dpi.

- All files should be named intelligently, reflecting the document title or document type.

- Files should not exceed 30 MB.

- It is preferred that the supplied forms and plan design documents be filled out, marked up electronically, and then submitted.

- Scanned content (in a PDF file) is acceptable, but not recommended for quality and clarity reasons.