



# PRIVATE CONSTRUCTION AGREEMENTS EXECUTIVE ORDER SOLUTION

User Guide

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## Version Control

### Document Attributes

<b>Document Name</b>	City of Lincoln - Private Construction Agreement User Guide.docx
<b>Current Version</b>	2.0
<b>Responsible Group</b>	DataBank / COL
<b>Author</b>	Solution Engineer

## Introduction and Overview

Welcome to the City of Lincoln Private Construction Agreements Executive Order Solution end-user training Guide. In this course, you will learn the entire Private Construction Agreements Workflow process in OnBase Web Client & Unity Client - the primary Enterprise Content Management applications used by the State of Nebraska and the City of Lincoln.

This document contains information for utilizing the PCA Executive Order Workflow and working documents through the Workflow.

OnBase is a robust application, used in many different ways within the City of Lincoln, with new solutions being added on a regular basis. Therefore, this guide cannot cover all of the potential ways that City of Lincoln - or individual divisions - will utilize the program. Additionally, your rights and privileges may not allow you to complete all of actions within this document. Contact your OnBase Administrator for additional information on specific modules, functionality, or custom OnBase solutions.

## OnBase Web Client - Logging In

**Role:** Developer's Engineer or any Public user requesting PCA EO

### Software

OnBase Web Client

### Public user access

Production URL: <https://ecmp.nebraska.gov/AppNet/Login.aspx>

### City of Lincoln Employees

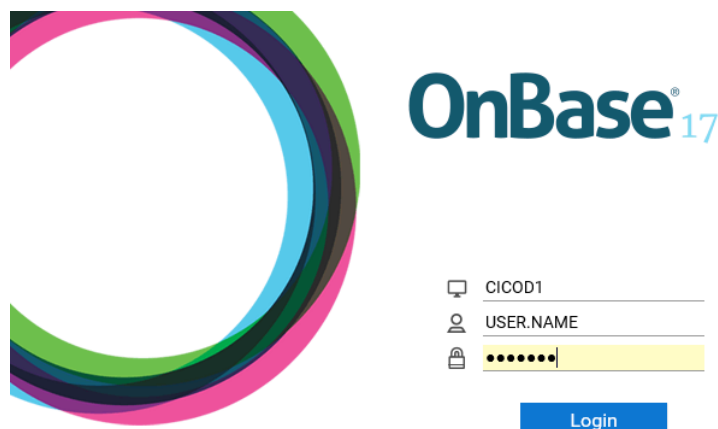
Login with network credentials

Production URL: <https://ecmcol.lincoln.ne.gov/AppNet/Login.aspx>

Test URL: <https://ecmcatcol.lincoln.ne.gov/AppNet/Login.aspx>

## Public User Instructions:

1. Solution pre-requisites:
  - a. Public User defined within the Nebraska Enterprise Content Management System.  
If this is the first time utilizing or need to change your password, visit:  
<https://enterpriseregistration.nebraska.gov/SelfRegistration.aspx>
  - b. Public User has been provided access:  
If this is your first time accessing the City of Lincoln PCA E.O. request system, the City of Lincoln will need to provide your user access to the solution. To request access, email Michaela Dugan at [mdugan@lincoln.ne.gov](mailto:mdugan@lincoln.ne.gov) and Victoria L. Keating at [VKeating@lincoln.ne.gov](mailto:VKeating@lincoln.ne.gov) the username defined in Step #1.
2. Once confirmation has been provided that you have access or if you were granted access previously, visit <https://ecmp.nebraska.gov/AppNet/Login.aspx> and login with your credentials defined in Step #1.



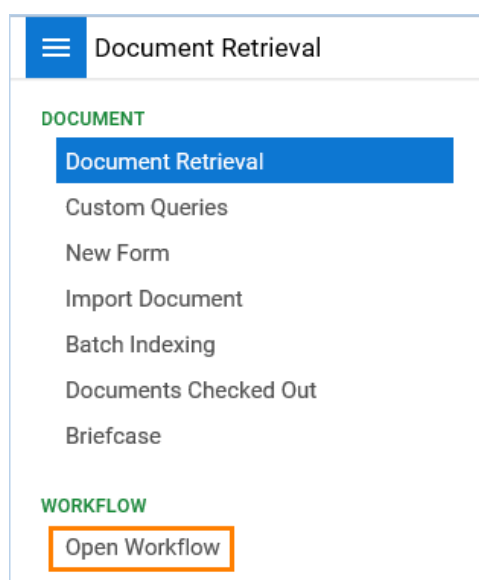
- a. By **Domain**, retain **CICOD1**
- b. By **Username**, your **Active Directory User Name** (Network login) may already be populated
- c. By the **Password**, enter your **Active Directory (Network) password**. (this is case sensitive)

3. Click **Login**.

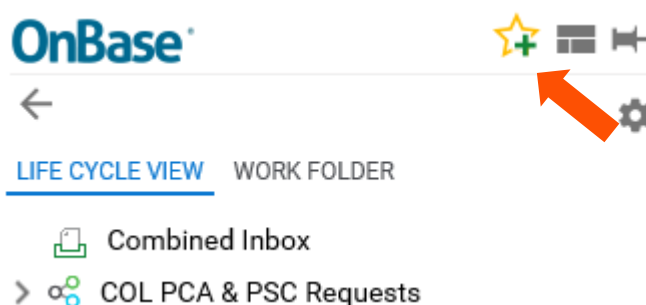
## Web Client - COL PCA & PSC Requests

### Personalizing Your Work Space

1. You will be logged into OnBase Web Client. To start a new request, you will need to access Workflow. Select the drop-down arrow to the right of **Document** and select **Workflow**. Workflow will display in a new browser window.



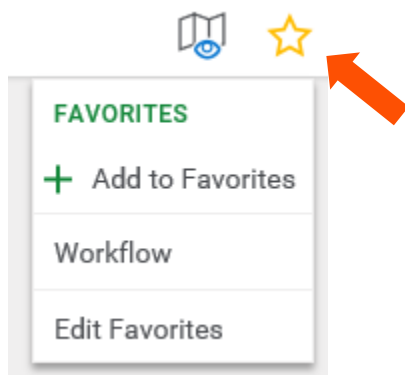
2. To reduce steps needed to access Workflow, the next time you login, we recommend that you add Workflow as a Favorite. While in Workflow, in the **Life Cycle View** tab, select the star icon to the right of the OnBase logo.



- a. Select **OK** when prompted to Add to Favorites.

3. Close the current Workflow browser window by clicking the X in the top-right corner of the screen.

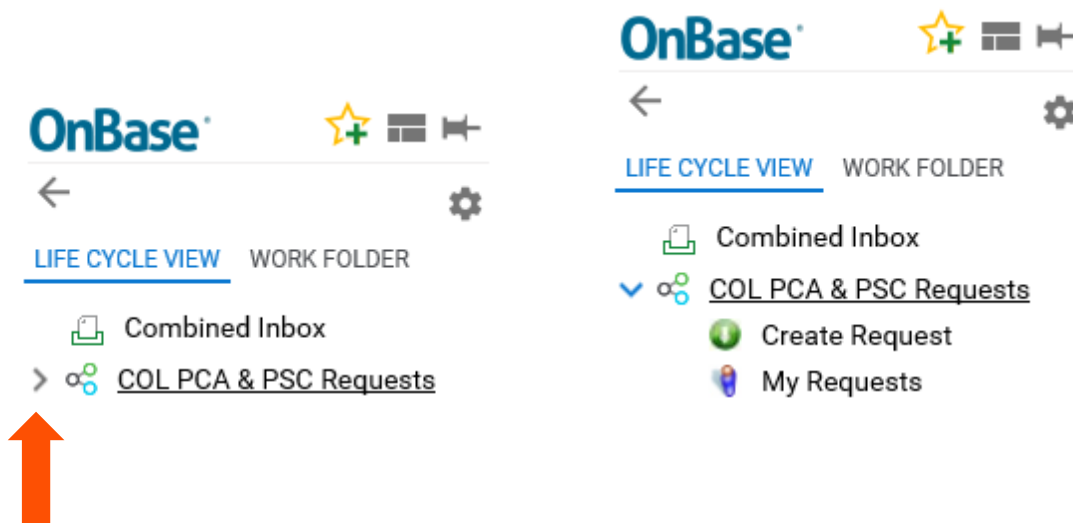
- While on the initial OnBase window, click the star to see the Workflow favorite that you just created. Click the Favorite you just added.



- Workflow displays in a new browser window.

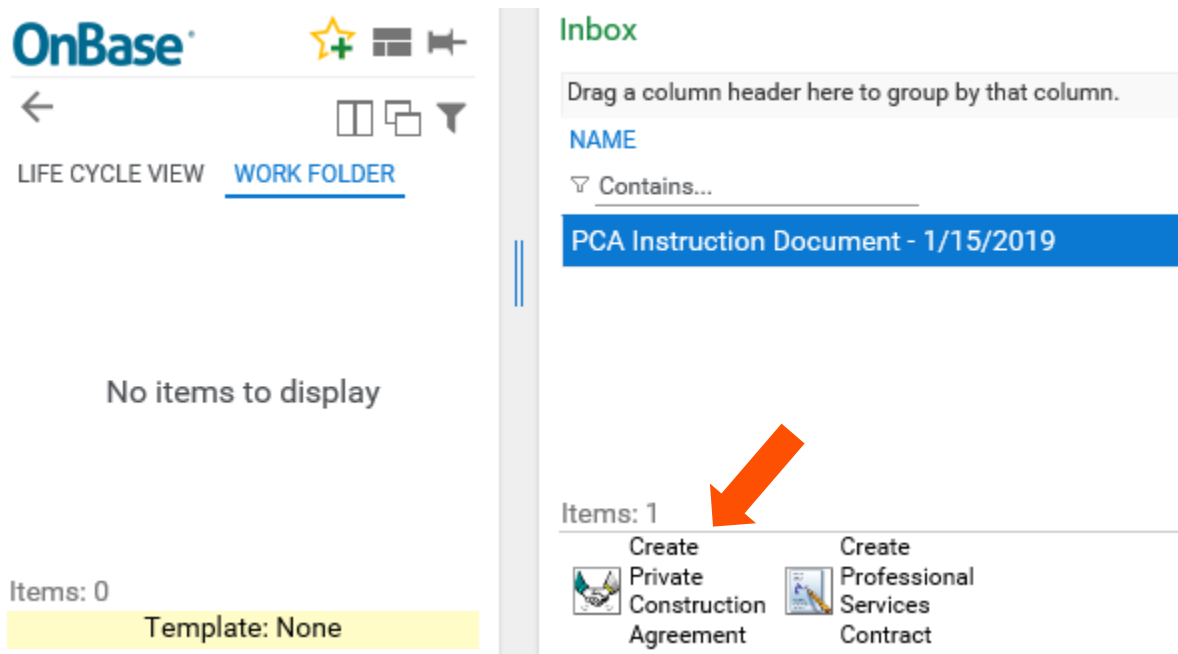
## Starting a New Request

- Select the arrow to the left of **COL PCA & PSC Requests** in the Life Cycle View pane to show **Create Request** and **My Request** Workflow queues.



- Click on the **Create Request** folder.
- Select the **Create Private Construction Agreement** button at the bottom of the Inbox pane and wait for the task to execute.





4. A message displays with a notification saying that a Private Construction Agreement - Executive Order Request form has been created and you can find it in the **My Requests Queue**. Click **OK**.



## Working with My Requests

1. Select the **Life Cycle View** tab to display the Workflow queues.

OnBase®

LIFE CYCLE VIEW WORK FOLDER

No items to display

Items: 0

Template: None

Inbox

Drag a column header here to group by that column.

NAME	ENTRY DATE
COL PCA EO Instruction Document - 2/7/2018	2/7/2018 10:35:29 AM

Items: 1

Create Request

2. Select the **My Requests** folder.

OnBase®

LIFE CYCLE VIEW WORK FOLDER

Combined Inbox

COL PCA & PSC Requests

Create Request

My Requests

3. The new request form will display in the **Inbox** pane with the **Document Date** populated. The **Document Date** is based on the date the **Create Private Construction Agreement** button was activated. Select the document in the **Inbox** and the City of Lincoln - Private Construction Agreement Executive Order request form will display below the **Inbox** pane.

OnBase®

LIFE CYCLE VIEW WORK FOLDER

No items to display

Items: 0

Template: None

Inbox

Drag a column header here to group by that column.

PROJECT NAME	DOCUMENT DATE	PUBLIC USERNAME	PERMITTEE BUSINESS NAME	FIRM BUSINESS NAME	CLASSIFICATION	SURETY TYPE	STATUS
	4/2/2019	COLPCAREQUESTER			PRIVATE CONSTRUCTION AGREEMENT		Awaiting Submission

Items: 3

Submit Attach Project Location Map Attach Grading Certificate Attach Letter of Credit Attach Bond Letter of Credit Template Attach Pre-submission Plans Attach Subsidy Calculation Subsidy Calculation Template Attach Supporting Document Notify COL of Updated Attachment (s) Remove Request

4. Input request information into the Request Form and click the **Save** button either at the top or bottom of the request form. You may want to do this periodically if you will have the form open for more than five minutes.

## City of Lincoln Executive Order Request Form for Private Construction Agreements

Request Information and Approvals

Tracking History

Project Location

Status

Awaiting Submission

Unqualified Written Acceptance Signee (Permittee)

The individual input within Unqualified Written Acceptance Signee section will be responsible for attesting that this application is correct. Once this application is submitted and reviewed by COL, this individual will receive an email to electronically sign the Unqualified Written Acceptance. Please verify prior to submitting the application that this is the appropriate individual. If this application does not include a business, input the individual's first and last name a second time within the Business Name field.

Entity Type

Engineer

Business Name

First Name

Last Name

Email

Phone

Confirm Email

Address

☐ Orn. Lighting

Totals:

0.00

0.00

0.00

0.00

Are you requesting a Water Main Subsidy?

NO

Are you requesting a Sanitary Sewer Subsidy?

NO

If you have additional feedback, comments, or special provisions regarding this request, please enter information below

N/A

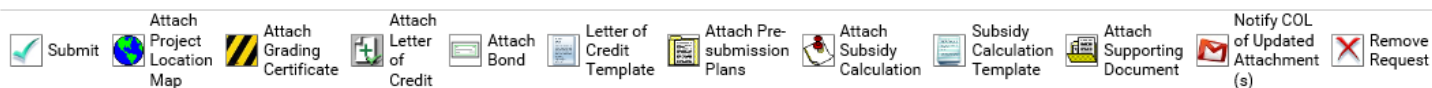
Save

Questions Completing this form?

Contact PCA Coordinator at 402-441-7558

Save

5. Prior to submitting a Private Construction Agreement Request form to the City of Lincoln, the following tasks are available:



- **Submit** - Utilized to submit the request form and associated documentation to the City of Lincoln. Only use this option when the request form is complete and ready for submission.
- **Attach Project Location Map** - Utilized to attach Project Location map to your request.

- **Attach Grading Certificate** - Utilized to attach a Grading Certificate to your request.
- **Attach Letter of Credit** - If the Surety type is Letter of Credit, this task is utilized to attach a copy of the project's letter of credit to your request.
- **Attach Bond** - If the Surety Type is Bond, this task is utilized to attach a copy of the project's Bond to your request.
- **Letter of Credit Template** - Utilized to download the City of Lincoln's Letter of Credit template.
- **Attach Pre-submission Plans** - Utilized to attach Water or Sanitary Sewer Subsidy submission plans to your request.
- **Attach Subsidy Calculation** - Utilized to attach your Subsidy Calculation document to accompany a Water or Sanitary Sewer Subsidy request.
- **Subsidy Calculation Template**: Utilized to download a Subsidy Calculation template document example.
- **Attach Supporting Document** - Utilized to attach supporting documentation pertinent to your request.
- **Notify COL of Updated Attachments(s)**: Utilized to notify the City of Lincoln of any updated attachments added after submission.
- **Remove Request** - Utilized to remove any request forms that were accidentally created or no longer needed(only available before the form has been submitted).

When selecting an **Attach...** button, the following interaction will display:

Select **Browse** > Windows **Choose File to Upload** window will display > browse to your file's location > select **Open** > select the **Upload** icon.

**Inbox**  
**User Interaction**

**FILE PATH**  
 Browse...

Document Types  
 COL EODO Project Location

File Type  
 Image File Format (.???)

Document Date  
 04/02/2019

**KEYWORDS**  
 COL-Tracking Number  
 80937628

Import Cancel Import

6. When the Request form is complete and ready for submission to the City of Lincoln, click the **Submit** button. The following interaction with conditions will display:

**OnBase**

LIFE CYCLE VIEW **WORK FOLDER**

No items to display

Items: 0

**Inbox**  
User Interaction

**Is this PCA EO Request Form complete, accurate, and ready for processing?**

- Please verify that **all information** contained in the request form is complete and accurate **prior** to selecting '**Yes**'.
- A Project Location Map is required, to upload a map of the general project location. Select Attach Project Location Map button prior to selecting 'Yes'.
- If Surety Type is Letter of Credit, attach Letter of Credit using the Attach Letter of Credit button prior to submitting. A template can be accessed by selecting the Letter of Credit Template button.
- If Surety Type is an Escrow Agreement, signature requests will be sent to the Developer and Financial Institution via DocuSign email notifications. *Prior to the Executive Orders being created, both the Developer and Financial Institution contacts on this EO Request Form must electronically sign escrow documents via DocuSign.*
- If Surety Type is a Check, instructions for submitting Surety payment to the City of Lincoln will be sent via email.
- If Improvement(s) selected have Engineering Fees, instructions for submitting Engineering Fees will be sent via email.
- If Water Main and/or Sanitary Sewer subsidy is requested, pre-submission plans and subsidy amount(s) calculations are required to be attached. Utilize 'Attach Pre-submission Plans' and 'Attach Subsidy Calculation' buttons prior to submitting. A template can be accessed by selecting 'Subsidy Calculation Template.'
- Once 'Yes' is selected, no changes can be made to information entered on this EO Request Form.
  - If changes are required after submitting, please notify the City of Lincoln.
    - The city will withdraw the EO Request Form and
    - You will need to initiate a new EO Request Form with correct information and submit for processing.
- If you are unsure or need to review information further, select 'No'

**Yes** **No**

#### Condition text:

#### Is this PCA EO Request Form complete, accurate, and ready for processing?

- Please verify that **all information** contained in the request form is complete and accurate **prior** to selecting '**Yes**'.
- A Project Location Map indicating two major arterial streets is required, to upload a map of the general project location. Select Attach Project Location Map button prior to selecting 'Yes'.
- If Surety Type is Letter of Credit, attach Letter of Credit using the Attach Letter of Credit button prior to submitting. A template can be accessed by selecting the Letter of Credit Template button.
- If Surety Type is an Escrow Agreement, signature requests will be sent to the Developer and Financial Institution via DocuSign email notifications. *Prior to the Executive Orders being created, both the Developer and Financial Institution contacts on this EO Request Form must electronically sign escrow documents in DocuSign.*
- If Surety Type is a Check, instructions for submitting Surety payment to the City of Lincoln will be sent via email.
- If Improvement(s) selected have Engineering Fees, instructions for submitting Engineering Fees will be sent via email.
- If Water Main and/or Sanitary Sewer subsidy is requested, pre-submission plans and subsidy amount(s) calculations are required to be attached. Utilize 'Attach Pre-submission Plans' and 'Attach Subsidy Calculation' buttons prior to submitting. A template can be accessed by selecting 'Subsidy Calculation Template'
  - Once 'Yes' is selected, no changes can be made to information entered on this EO Request Form.
    - If changes are required after submitting, please notify the City of Lincoln.
      - The city will withdraw the EO Request Form and
      - You will need to initiate a new EO Request Form with correct information and submit for processing.

- If you are unsure or need to review information further, select 'No'.

If you select **Yes** to the above conditions, OnBase will process your request. This process may take a minute. Wait for the following prompt to display. Click **OK** and close OnBase windows.



7. Within a few minutes of submission, the Permittee and Engineer indicated on the request form will receive emailed instructions for next steps. This email may also include payment instructions for submitting pre-paid engineering and/or check Surety fees. Check payment for fees must be received before any review/approval process will occur.
8. If the Surety type selected was Escrow, the Financial Institution and Permittee will receive an email from DocuSign to electronically sign their portion of the escrow agreement. Escrow document signatures must be received prior to the review/process occurring.

## OnBase Unity Client - Logging In

1. Double click on the **Unity Client** icon

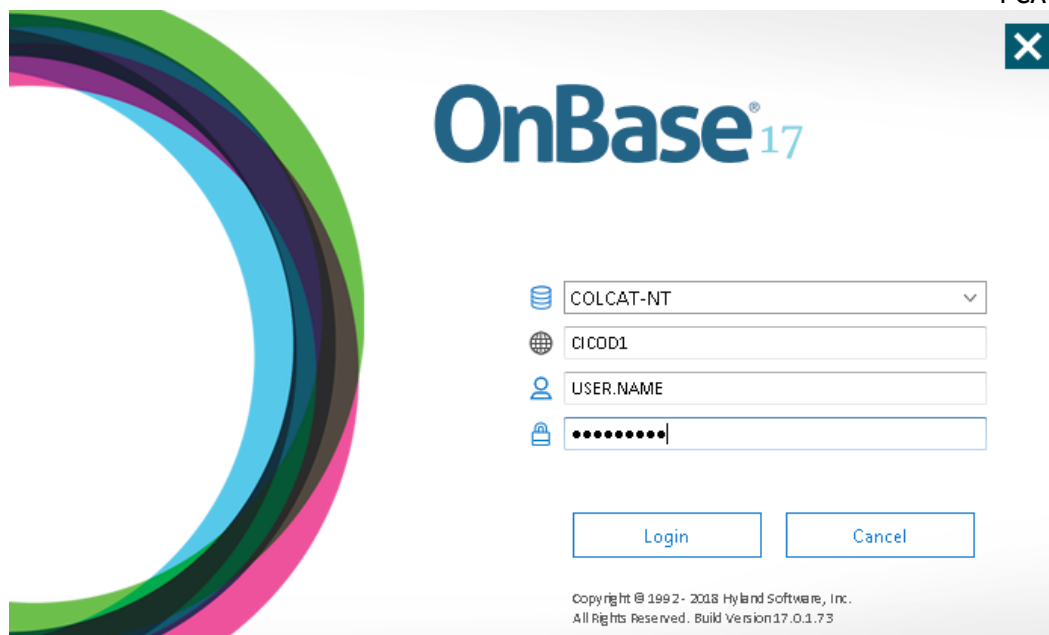





Note: You may have two OnBase icons on your desktop. Unity Client PROD and CAT.

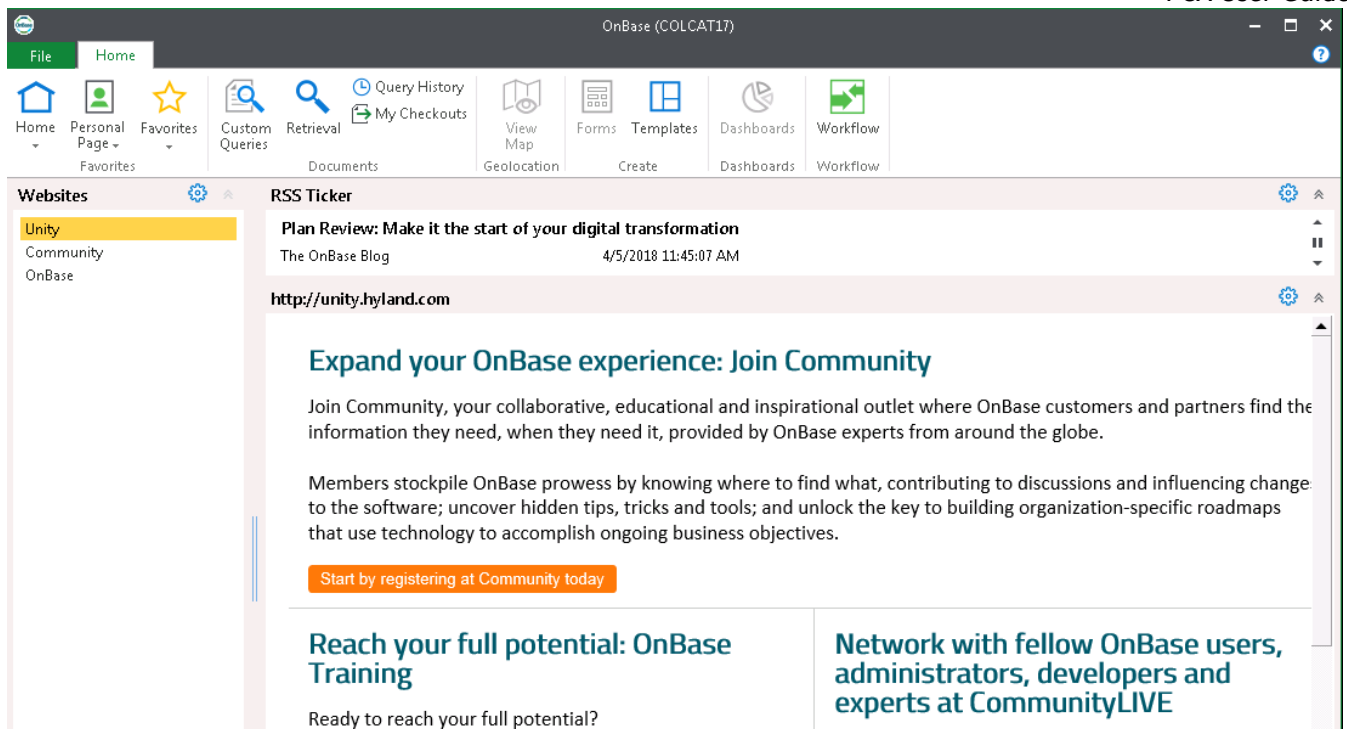
PROD: OnBase access to the Production (PROD) environment.

CAT: OnBase access to the Customer Acceptance Testing (CAT) environment.

2. The OnBase login screen will appear.



- a. By the  icon, retain **CICOD1**
  - b. By the  icon, your **Active Directory User Name** (Network login) may already be populated
  - c. By the  icon, enter your **Active Directory (Network) password**. (this is case sensitive)
3. Click **Login**.
  4. OnBase Unity Client will load, taking you to the Home screen.



OnBase has various tabs across the top of the screen. Each tab contains a ribbon of icons (similar to Microsoft Office products).

⇒ **NOTE:** The tabs and icons you see and can use are controlled by your user's assigned rights. This document will cover a small segment of these tabs and icons.



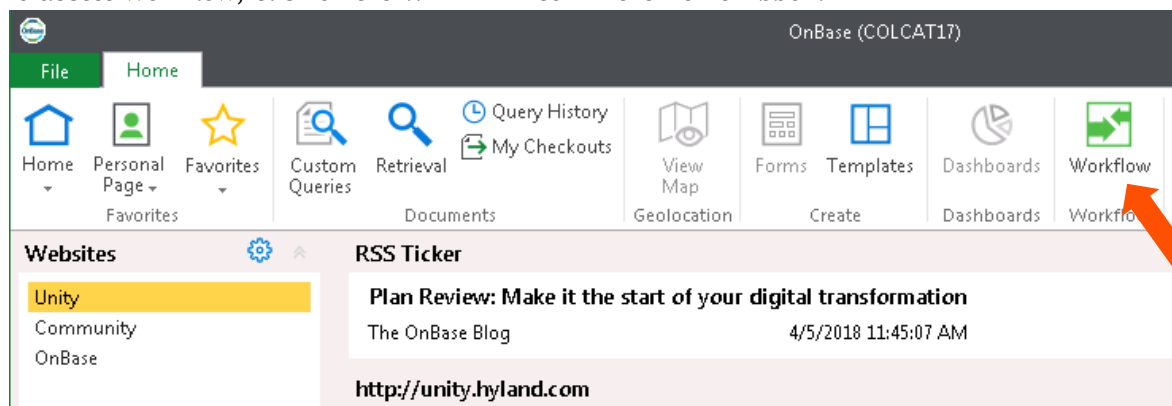
## COL PCA & PSC Coordination

### Business Office

**Role:** City of Lincoln Business Office

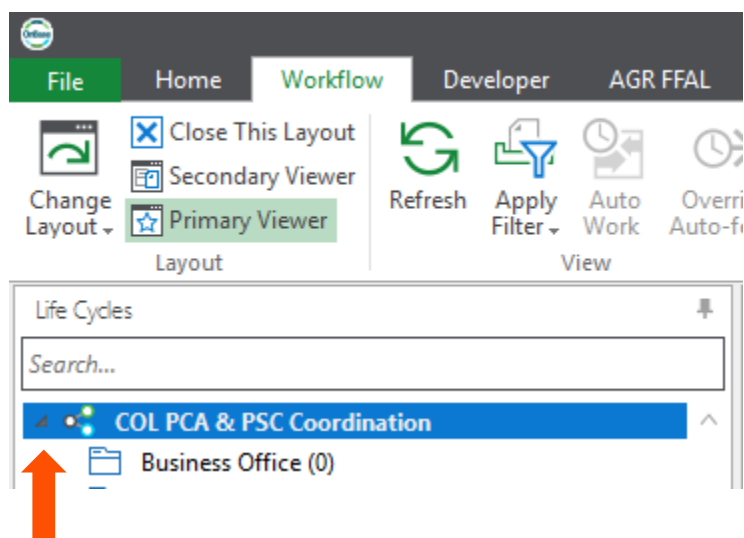
**Active Directory/OnBase User Group:** COL PCA EO Business Office

1. Users defined within the **COL PCA EO Business Office** group will be notified via email when a new PCA EO Request form has entered this queue waiting for Project Number assignment.
2. The user will need to access OnBase Unity Client and login with their CICOD1 network credentials.
3. To access Workflow, click on the **Workflow** icon in the Home ribbon.



4. To view the queues you have access to, expand **COL PCA & PSC Coordination** lifecycle.

NOTE: The number in parenthesis at the end of the queue name indicates the number of items waiting your process step.



5. Select a City of Lincoln - Private Construction Agreement - Executive Order Request Form from the **Inbox** pane.

- Review the Request form. When you are ready to assign the **Project #** for each improvement, enter the Project #s on the form. Click the **Save** button at either the top or bottom of the form.

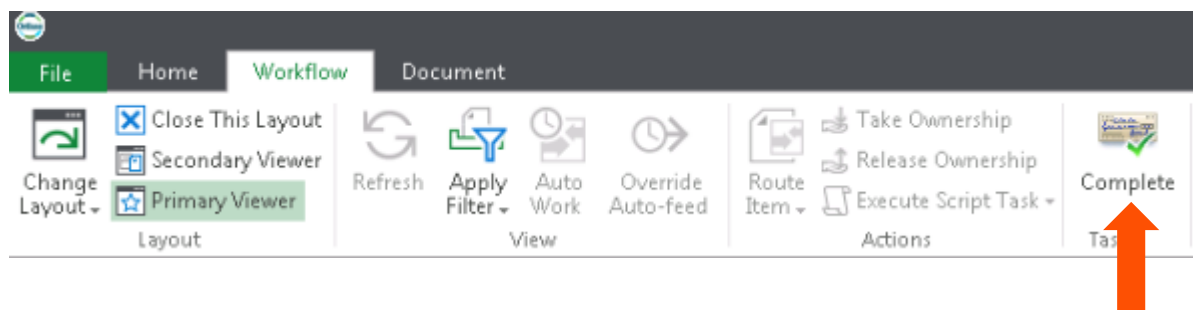
NOTE: The solution highlights which fields need input in orange.

#### Requested Improvements

Select each improvement type for this project. Once an improvement type is selected, input estimated improvement cost related to the improvement type (rounded to the nearest \$100). Once the application is submitted, instructions for submitting payment to the City of Lincoln will be emailed to all addresses within this application. Proper surety and pre-paid engineering fees must be received and accepted by the City of Lincoln before the review and approval process will begin. Only after proper fees are accepted, the Executive Order review and approval process will start. If the improvement type you are requesting falls outside of the five categories below, you may enter it in the last row. Please specify the type of improvement in the first column of that row.

Improvement Type	-Estimated Cost	-Engineering Fee	-Performance Bond	-Retainer	-Project #	-PCA #	-EO #
<input checked="" type="checkbox"/> Storm Sewer	\$5,000,000.00	2500.00	4750000.00	250000.00			
<input type="checkbox"/> Paving							
<input checked="" type="checkbox"/> Water Main	\$650,000.00	2500.00	617500.00	32500.00			
<input checked="" type="checkbox"/> Sanitary Sewer	\$452,200.00	2500.00	429600.00	22600.00			
<input type="checkbox"/> Orn. Lighting							
Totals:	6102200.00	7500.00	5797100.00	305100.00			

- When the Project #s have been entered for each improvement, click the **Complete** task button in the Workflow ribbon to finish the Business Office process step.

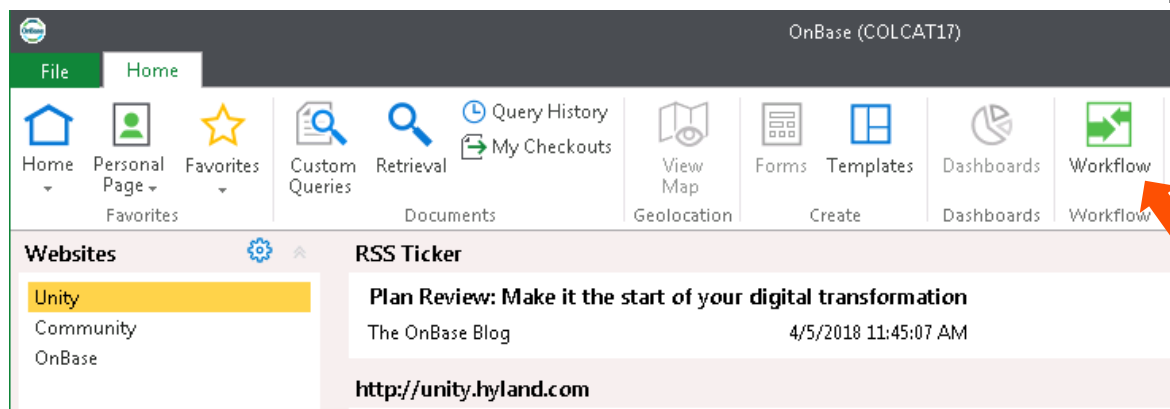


## Wastewater

**Role:** City of Lincoln PCA Wastewater

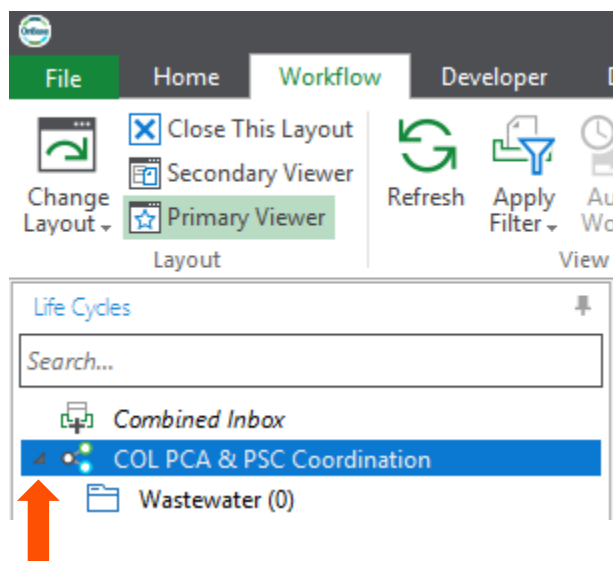
**Active Directory/OnBase User Group:** COL PCA EO Wastewater

- Users defined within the **COL PCA EO Wastewater** group will be notified via email when a new PCA EO Request form has entered their queue.
- The user will need to access OnBase Unity Client and login with their CICOD1 network credentials.
- To access Workflow, click on the **Workflow** icon in the Home ribbon.



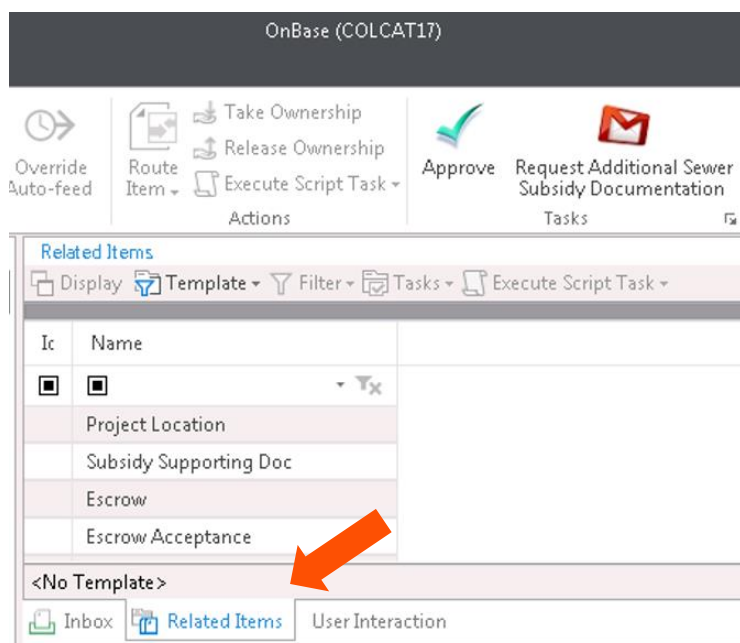
4. To view the queues you have access to, expand **COL PCA & PSC Coordination** lifecycle.

NOTE: The number in parenthesis at the end of the queue name indicates the number of items waiting your process step.



5. Select a City of Lincoln - Private Construction Agreement - Executive Order Request form from the **Inbox** pane.
6. Review the Request form.

NOTE: To review documents related to the selected Request form, select the Related Items tab. Double click on any of the related items to open them in another window.



7. When you've completed your review, input 'Approval' or any other comments that you have regarding the request in the **Sanitary Sewer Subsidy** box on the form, click the 'Sanitary Sewer Subsidy Approved' check box and click **Save** on either the top or the bottom of the form.

NOTE: Any comments placed on the Request form are viewable to all reviewers/approvers involved in the solution, as well as the public user whom created the request.

**Sanitary Sewer Subsidy**

Comments input within the section below are viewable to the PCA Requester

☐ Sanitary Sewer Subsidy Approved  
☐ Sanitary Sewer Subsidy Denied

**Sanitary Sewer Reviewer**

**Sewer Reviewer Date**

8. If you have a reason to request additional information from the requester, use the **Request Additional Sewer Subsidy Documentation** task button to send an email to the requester.



When you click the **Request Info** button, a message will appear asking if you've entered your comments in the Sanitary Sewer Subsidy Comments box.

- If you have, click **Yes**. OnBase will send an email with your comments to the requester.
- If you have not, click **No**. You will be returned to the form to enter your comments.

- When you are ready to approve the Request form, use the **Approve** task button. A message will appear asking if you are sure you want to approve the request form. Once approved, the Request form will be sent to the PCA Coordinator.



- When you are ready to deny the Request form, use the **Deny Subsidy** task button. A message will appear asking if you are sure you want to deny the request form. Once denied, the Request form will be sent to the PCA Coordinator.

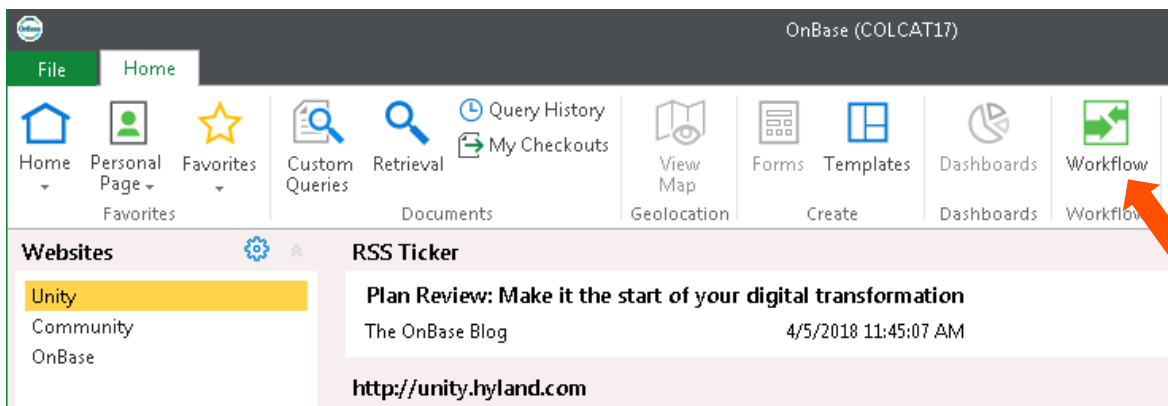


## Water

**Role:** City of Lincoln PCA Water

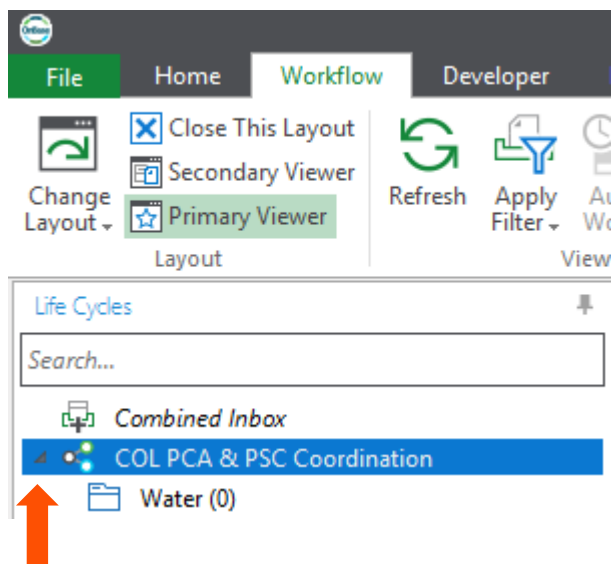
**Active Directory/OnBase User Group:** COL PCA EO Water

- Users defined within the **COL PCA EO Water** group will be notified via email when a new PCA EO Request form has entered their queue.
- The user will need to access OnBase Unity Client and login with their CICOD1 network credentials.
- To access Workflow, click on the **Workflow** icon in the Home ribbon.



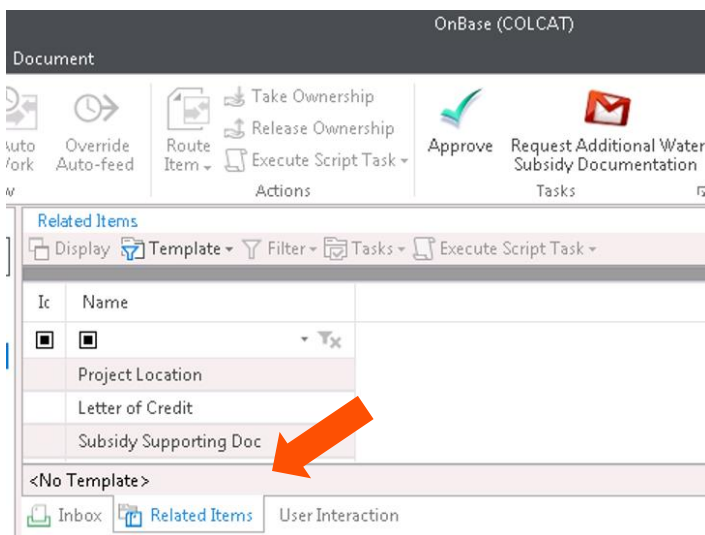
- To view the queues you have access to, expand **COL PCA & PSC Coordination** lifecycle.

**NOTE:** The number in parenthesis at the end of the queue name indicates the number of items waiting your process step.



5. Select a City of Lincoln - Private Construction Agreement - Executive Order Request form from the **Inbox** pane.
6. Review the Request form.

NOTE: To review documents related to the selected Request form, select the Related Items tab. Double click on any of the related items to open them in another window.



7. When you've completed your review, input 'Approval' or any other comments that you have regarding the request in the **Water Main Subsidy** box on the form, click the 'Water Main Subsidy Approved' check box and click **Save** on either the top or the bottom of the form.

NOTE: Any comments placed on the Request form are viewable to all reviewers/approvers involved in the solution, as well as the public user whom created the request.

**Water Main Subsidy**

Comments input within the section below are viewable to the PCA Requester

☐ Water Main Subsidy Approved  
☐ Water Main Subsidy Denied

**Water Reviewer**

**Water Reviewer Date**

8. If you have a reason to request additional information from the requester, use the **Request Additional Water Subsidy Documentation** task button to send an email to the requester.



When you click the **Request Info** button, a message will appear asking if you've entered your comments in the Water Main Subsidy Comments box.

- If you have, click **Yes**. OnBase will send an email with your comments to the requester.
- If you have not, click **No**. You will be returned to the form to enter your comments.

9. When you are ready to approve the Request form, use the **Approve** task button. A message will appear asking if you are sure you want to approve the request form. Once approved, the Request form will be sent to the PCA Coordinator.



10. When you are ready to deny the Request form, use the **Deny Subsidy** task button. A message will appear asking if you are sure you want to deny the request form. Once denied, the Request form will be sent to the PCA Coordinator.

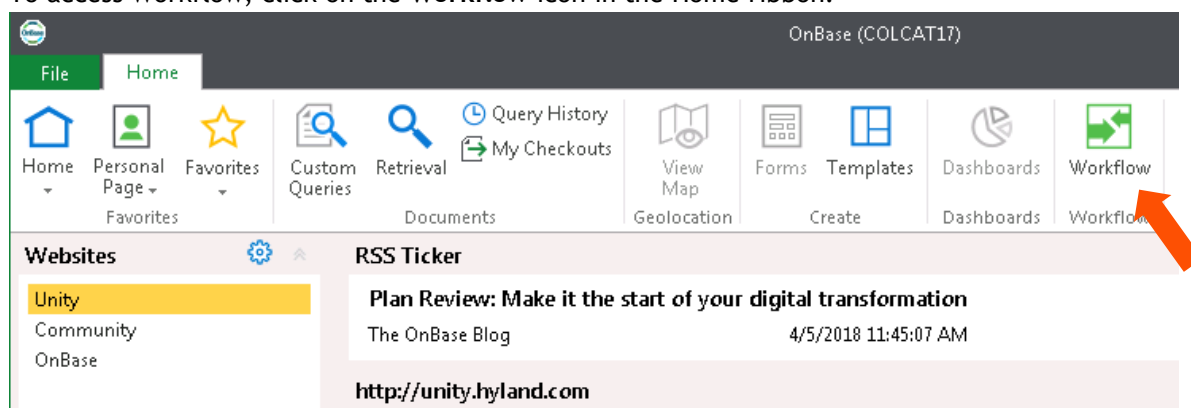


## Coordinator

**Role:** City of Lincoln PCA Coordinator

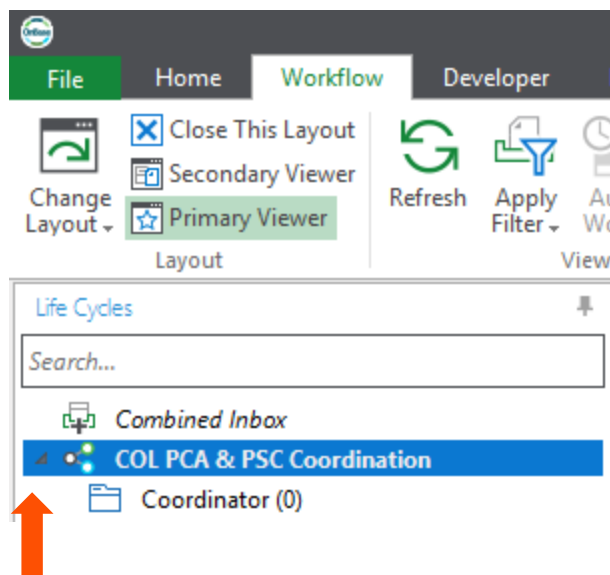
**Active Directory/OnBase User Group:** COL EODO Coord-LTU PCA

1. Users defined within the **COL EODO Coord-LTU PCA** group will be notified via email when a new PCA EO Request form has entered their queue.
2. The user will need to access OnBase Unity Client and login with their CICOD1 network credentials.
3. To access Workflow, click on the **Workflow** icon in the Home ribbon.



4. To view the queues you have access to, expand **COL PCA & PSC Coordination** lifecycle.

NOTE: The number in parenthesis at the end of the queue name indicates the number of items waiting your process step.



5. Select a City of Lincoln - Private Construction Agreement - Executive Order Request form from the **Inbox** pane.
6. Review the Request form.
7. When the **engineering fees** have been received, input the amount received in the **Pre-paid Engineering Fees Received** field. Also input the date the payment was received in the **Received Date** field. Click the **Save** button at either the top or the bottom of the form.



Pre-paid Engineering Fees Received

Received Date

8. If the requestor requested a subsidy, they will have input information into the following section:

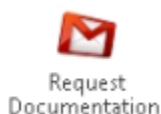
Are you requesting a Water Main Subsidy?		
<input type="text" value="NO"/>		
Are you requesting a Sanitary Sewer Subsidy?	Description	Subsidy Amount
<input type="text" value="YES"/>	Cost to upgrade sanitary sewer from 8" to 12" diameter	\$4,000.00

9. If there are special provisions that will be included into the EOs, input the text for the appropriate improvement type(s) in the **Special Provisions** section of the form. When done, click the **Save** button at either the top or the bottom of the form.

NOTE: The text input will be transferred over to the corresponding EO documents.

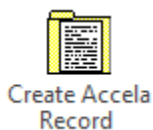
Special Provisions	
Storm Sewer <input type="text" value="N/A"/>	Sanitary Sewer <input type="text" value="N/A"/>
Paving <input type="text" value="N/A"/>	Ornamental Lighting <input type="text" value="N/A"/>
Water Main <input type="text" value="N/A"/>	Other <input type="text" value="N/A"/>

10. If you need to request documentation from the PCA Requestor, you can use the **Request Documentation** task.



- Once you click the **Request Documentation** button, a message will display asking if you have entered instructions for the Requestor in the Coordinator Comments box on the request form.
- If you have, click 'Yes'. An email will be sent to contacts on the PCA Request form. The email includes the text input from the Coordinator Comments box.
- If you have not, click 'No' or 'Cancel'. An email will not be sent and you will be returned to the PCA Request form to input Coordinator comments.

11. Once the **Project Number(s)** have been entered and the Water/Wastewater departments have approved the request(if necessary) the status will change to **Project Number Entered**. At that time the **Create Accela Record** ad hoc will appear. Select this ad hoc when you are ready to create the project records in Accela. This will also flood in the PCA numbers for each improvement type.



12. When Engineering Fees have been received, PCA #s assigned, Escrow Agreements (if surety type is escrow) have been signed, and the data validation is good, you can move forward with creating EO(s). Select the Create EO task button on the Workflow ribbon.



OnBase will create EO documents in the background and will automatically attach them as Related Items to the PCA Request form.

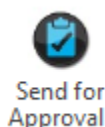
13. When the EO(s) have generated, you will need to request a developer's signature. To do so, click on the **Request Developer Signature** task on the Workflow ribbon.



OnBase will upload the Executive Orders and an email will be sent to the Developer requesting the developer's signature with a link to the EO in DocuSign. The status of the project will be updated to **Awaiting Signature**.

NOTE: The DocuSign process could take up to **30 minutes** from the time the Request Developer Signature task is executed. Once the developer has signed the EO document(s) electronically, it may take another 30 minutes before OnBase recognized the signed documents. The status of the project will then change to **Developer Signed**.

14. Once the developer has signed the EO form, the **Send for Approval** task is available. Click this button to route the form to Development Services and Law in the **COL E.O./D.O. Approval** lifecycle for concurrent review.



Once both Development Services and Law have given their approval, the EO form will be routed to the Mayor. When the Mayor approves the form, it will be routed to the Mayor's Office for E.O. number assignment and signed versions of E.O.(s) are generated. The Mayor's Office then routes the signed E.O. forms to the City Clerk's office for final review. Once the City Clerk's process has been completed, the executed E.O.(s) are routed back to the PCA Coordinator.

Below are other tasks that are available to the coordinator before sending the request for approval:

15. The PCA Coordinator has the ability to attach any supporting documentation to the form by using the **Upload Supporting Documents** task.



An upload window will open that allows you to find the supporting documentation on your computer and upload it as a related item to the E.O. form.

16. If a PCA Request form needs to be withdrawn or voided, you can use the **Withdraw/Void Request** task to remove the form from the OnBase Workflow.

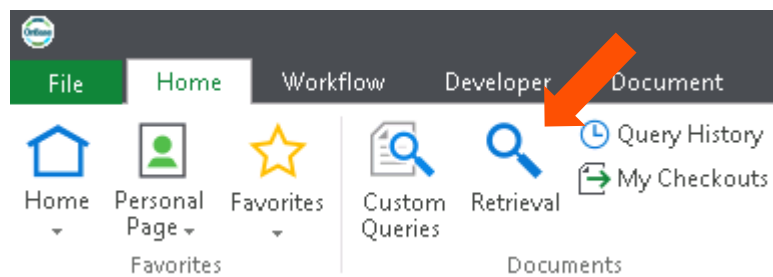


- a. When clicked, a message will appear asking if you have entered a reason for withdrawing or voiding the request in the **Coordinator Comments** box.
  - If you have, click **Yes**. Another message will appear asking if you are sure you want to withdraw or void the request.
    - Click **Withdraw** if the PCA Requestor wants to withdraw the request.
    - Click **Void** if the City of Lincoln is voiding the request.
    - Select **Cancel** if you want to stop the process of withdrawing or voiding the request.
  - If you have not, click **No** or **Cancel** to return to the form and enter the comments.
- b. If **Escrow** and/or **Unqualified Written Acceptance** documents were created and submitted to DocuSign, those documents must be voided from DocuSign.
  - Right-click on the Escrow document or the Escrow Acceptance document in the Related Items pane. Select DocuSign and Void.
  - A message appears asking for a reason for the void. Type a reason in the comment field and click **OK**.

NOTE: Depending on the PCA request and processing step, these documents may or may not exist.

- c. The Withdraw/Void process will remove the PCA Request form from Workflow and update the form's status to either **Withdrawn** or **Voided**.

NOTE: Documents removed from Workflow can still be reviewed by using the **Retrieval** task on the Home ribbon.



## COL E.O./D.O. Approval

## Law

Upon logging in with a user that is part of the **COL EODO Law** user group, the user will have access to one workflow queue within the COL E.O./D.O. Approval life cycle; **Law**. This queue is load balanced to only show those E.O./D.O. request forms that are assigned to that department.

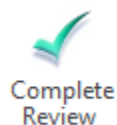
The screenshot shows the 'Life Cycles' sidebar with a search bar and a list of queues. The 'Law (7)' queue is highlighted in blue at the bottom of the list.

After the Coordinator approves the request from the COL PCA & PSC Coordination life cycle, the request will enter this queue as part of the concurrent approval from the Law and Department Signer. Once all concurrent approvals are complete, the request form will transition to the Mayor's queue for approval.

The screenshot shows the 'Complete Review' task in the 'Law' queue. The interface includes a ribbon with tabs for File, Home, Workflow, Developer, and Document. The 'Workflow' tab is active, showing various actions like 'Complete Review', 'Request Additional Info', and 'Upload Fast Facts'. Below the ribbon is an 'Inbox' table with columns: 'Ic', 'Assigned To', 'Status', 'COL EODO Rush', 'Requesting Department Conl', and 'Requesting Department'.

Ic	Assigned To	Status	COL EODO Rush	Requesting Department Conl	Requesting Department
<input checked="" type="checkbox"/>	Don W. Taute	Awaiting Approval	RUSH	DARYL.ELLER	TRANSPORTATION AND UTILITIES
<input checked="" type="checkbox"/>	Jocelyn W. Golden	Awaiting Approval		Daryl Eller	PARKS & RECREATION
<input checked="" type="checkbox"/>	Abigail F. Littrell	Awaiting Approval		COLEODOCoordPCATest	TRANSPORTATION AND UTILITIES - RIGHT-OF-WAY MANAGEMENT
<input checked="" type="checkbox"/>	Abigail F. Littrell	Awaiting Approval		COLEODOCoordPCATest	TRANSPORTATION AND UTILITIES - RIGHT-OF-WAY MANAGEMENT
<input checked="" type="checkbox"/>	Abigail F. Littrell	Awaiting Approval		COLEODOCoordPCATest	TRANSPORTATION AND UTILITIES - RIGHT-OF-WAY MANAGEMENT
<input checked="" type="checkbox"/>	Abigail F. Littrell	Awaiting Approval		COLEODOCoordPCATest	TRANSPORTATION AND UTILITIES - RIGHT-OF-WAY MANAGEMENT
<input checked="" type="checkbox"/>	Don W. Taute	Awaiting Approval		Michaud, Adam	TRANSPORTATION AND UTILITIES - RIGHT-OF-WAY MANAGEMENT
<input checked="" type="checkbox"/>	Don W. Taute	Awaiting Approval		COLEODOCOORDDESCETEST	TRANSPORTATION AND UTILITIES

## Ad Hoc: Complete Review



This task requires the Law representative to enter comments and check the 'Law Approved' check box on the request form. Once these steps have been complete, the *Complete Review* task will remove the item from the Law queue and mark the request as approved by the Law department.

The screenshot shows the 'Law' task form. It includes a 'Comments' section with a text area containing 'Test Comments'. Below the comments is a checkbox labeled 'Law Approved' which is checked. To the right of the checkbox are two input fields: 'Law Approver' with the value 'COLEODOLawTest' and 'Approved Date' with the value '02/06/2019'.

## Ad Hoc: Request Additional Info



Request Additional  
Info

This task will send the request form back to the **Coordinator** queue for the coordinator to review and resend for approval. If there are concurrent approvals when this task is selected, the user will be prompted with the below message.

User Interaction

**Please select which departments will re-review the E.O./D.O. request?**

**If All Departments Re-review is selected, all other reviewer approvals will be removed and they will be notified of the re-review request.**

**If My Department Re-review is selected, other reviewers' approval process will not be affected.**

**If you've selected this in error, select the Cancel button.**

All Departments Re-review

My Department to Re-review

Cancel

Inbox

User Interaction

If ***All Departments Re-Review*** is selected, all other reviewer approvals will be removed from their current queues and they will be notified of the re-review request.

If ***My Department Re-review*** is selected, all other reviewer approvals will remain in their current queues and they can continue on with the approval process. The status of the reviewer approval form for the department that selected the task will be changed to Requested Info and will not allow the user to select any additional tasks until the information they have requested has been received.

If ***Cancel*** is selected, then the reviewer approval form and all related reviewer approval forms will not be affected.

## Ad Hoc: Upload Fast Facts



*Upload Fast Facts* functions similar to the *Upload Supporting Documents* task but defaults the document type to COL EODO Fast Facts.

Once the document upload is complete, it will be located in the 'Related Items' window of workflow.

Related Items	
<div> <span>Display</span> <span>Template</span> <span>Filter</span> <span>Tasks</span> <span>Ex</span> </div>	
ic	Name
<input checked="" type="checkbox"/>	Contract - 2/4/2019
<input checked="" type="checkbox"/>	Fast Facts - 2/4/2019

## Department Signer(City Engineer)

Upon logging in with a user that is part of the **COL EODO Dept Signer-LTU PCA** user group, the user will have access to one workflow queue within the COL E.O./D.O. Approval life cycle; **Department Signer**. This queue is load balanced to only show those E.O./D.O. request forms that are assigned to the Department Signer.

Life Cycles

Search...

Combined Inbox

COL E.O./D.O. Approval

Law (7)

After the Coordinator approves the request from the COL PCA & PSC Coordination life cycle, the request will enter this queue as part of the concurrent approval from the Law and Department Signer. Once all concurrent approvals are complete, the request form will transition to the Mayor's queue for approval.

File Home Workflow Developer Document

Change Layout Close This Layout Secondary Viewer Primary Viewer Layout

Refresh Apply Filter Auto Work Override Auto-feed View

Route Item Take Ownership Release Ownership Execute Script Task Actions

Complete Review Request Additional Info Upload Fast Facts Tasks

Life Cycles

Search...

Combined Inbox

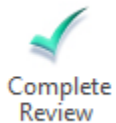
COL E.O./D.O. Approval

Law (8)

Inbox

Id	Assigned To	Status	COL EODO Rush	Requesting Department Conf	Requesting Department
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Don W. Taute	Awaiting Approval	RUSH	DARYL.ELLER	TRANSPORTATION AND UTILITIES
	Jocelyn W. Golden	Awaiting Approval		Daryl Eller	PARKS & RECREATION
	Abigail F. Littrell	Awaiting Approval		COLEODOCoordPCATest	TRANSPORTATION AND UTILITIES - RIGHT-OF-WAY MANAGEMENT
	Abigail F. Littrell	Awaiting Approval		COLEODOCoordPCATest	TRANSPORTATION AND UTILITIES - RIGHT-OF-WAY MANAGEMENT
	Abigail F. Littrell	Awaiting Approval		COLEODOCoordPCATest	TRANSPORTATION AND UTILITIES - RIGHT-OF-WAY MANAGEMENT
	Abigail F. Littrell	Awaiting Approval		COLEODOCoordPCATest	TRANSPORTATION AND UTILITIES - RIGHT-OF-WAY MANAGEMENT
	Don W. Taute	Awaiting Approval		Michaud, Adam	TRANSPORTATION AND UTILITIES - RIGHT-OF-WAY MANAGEMENT
	Don W. Taute	Awaiting Approval		COLEODOCOORDDESCETEST	TRANSPORTATION AND UTILITIES

## Ad Hoc: Complete Review



This task requires the Department Signer to enter comments and check the 'Department Signer Approved' check box on the request form. Once these steps have been complete, the *Complete Review* task will remove the item from the Department Signer queue and mark the request as approved by the Department Signer.

Department Signer

Comments

Test Comments

☒ Department Signer Approved

Department Signer Approver

COLEODODeptSignerLTUPCA

Approved Date

02/06/2019

## Ad Hoc: Request Additional Info



Request Additional  
Info

This task will send the request form back to the **Coordinator** queue for the coordinator to review and resend for approval. If there are concurrent approvals when this task is selected, the user will be prompted with the below message.

User Interaction

**Please select which departments will re-review the E.O./D.O. request?**

**If All Departments Re-review is selected, all other reviewer approvals will be removed and they will be notified of the re-review request.**

**If My Department Re-review is selected, other reviewers' approval process will not be affected.**

**If you've selected this in error, select the Cancel button.**

All Departments Re-review

My Department to Re-review

Cancel

Inbox

User Interaction

If ***All Departments Re-Review*** is selected, all other reviewer approvals will be removed from their current queues and they will be notified of the re-review request.

If ***My Department Re-review*** is selected, all other reviewer approvals will remain in their current queues and they can continue on with the approval process. The status of the reviewer approval form for the department that selected the task will be changed to Requested Info and will not allow the user to select any additional tasks until the information they have requested has been received.

If ***Cancel*** is selected, then the reviewer approval form and all related reviewer approval forms will not be affected.



## Ad Hoc: Upload Fast Facts



*Upload Fast Facts* functions similar to the *Upload Supporting Documents* task but defaults the document type to COL EODO Fast Facts.

[Workflow] User Interaction

File Import

Browse Acquire Import Cancel Move Up Move Down Remove Remove All Rotate Left Rotate Right

Import Import Pages Transforms

Import Preview

Document Type Group

<All>

Document Type

COL EODO Fast Facts

File type

Document Date

02/04/2019

Keywords

COL-Tracking Number

80809218

Options

Import Cancel

Once the document upload is complete, it will be located in the 'Related Items' window of workflow.

Related Items	
Display Template Filter Tasks Ex	
Icon	Name
	Contract - 2/4/2019
	Fast Facts - 2/4/2019

## Mayor

Upon logging in with a user that is part of the Mayor's user group, the user will have access to one workflow queue within the COL E.O./D.O. Approval life cycle; **Mayor**.

Life Cycles

Search...

- Combined Inbox
- COL E.O./D.O. Approval
- Mayor (1)**

All Executive Orders will need to be approved by the Mayor. The Request Forms will enter this queue upon the department review and approvals.

File Home Workflow Developer Document Queue Administration

Change Layout Close This Layout Secondary Viewer Primary Viewer

Refresh Apply Filter Auto Work Override Auto-feed Route Item Take Ownership Release Ownership Execute Script Task Approved Request Info

Life Cycles

Search...

Combined Inbox

COL E.O./D.O. Approval

Mayor (1)

Inbox

Id	Status	COL EODO Rush	Requesting Department	Requesting Department Cont	Classification
	Awaiting Approval	COL EODO Rush	TRANSPORTATION AND UTILI	ADAM.MICHAUD	CONSTRUCTION AGREEMENT

The Mayor will have access to the Executive Order document within the Related Items window. This document is a merged PDF document containing all related documents to the request.

Related Items

Display Template Filter Tasks Ex

Id	Name
	Executive Order - - 2/4/2019

Upon review, the Mayor will have the option to enter any comments prior to approving the Executive Order request. The Mayor does not need to check the Mayor Approved box as this will be auto-populated by the ad hoc task *Approve*.

Mayor

Comments

☐ Mayor Approved

Mayor Approver

Approved Date

## Ad Hoc: Approve



The *Approve* task will remove the request form from the Mayor queue and mark the request as approved by the Mayor. Upon approval, the Mayor will be prompted with a message box asking if they are sure they would like to approve this request. By selecting **Yes**, the request will move to the Mayor's Office queue for further action. By selecting **No**, the request will remain in the Mayor's queue.

User Interaction

**Are you sure you want to approve this request?**

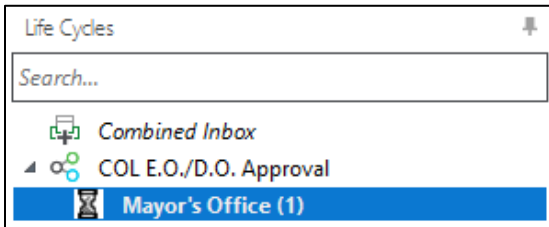
## Ad Hoc: Request Info



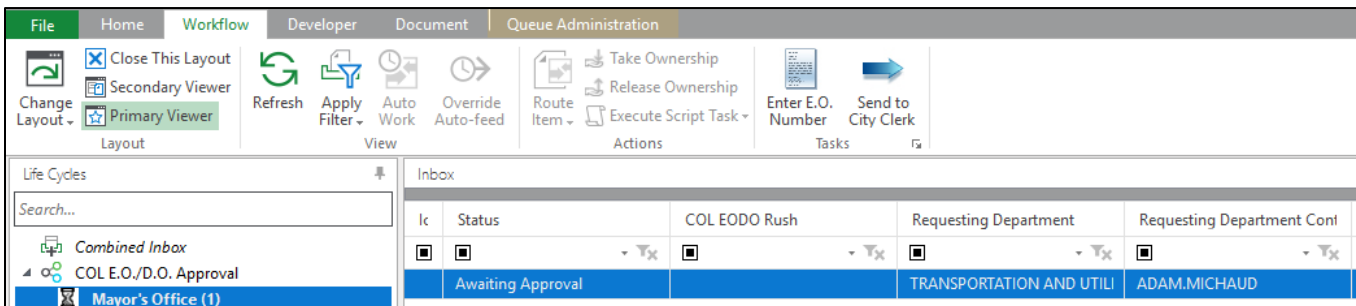
This task will send the request form back to the **My Request** queue for the coordinator to review and resend for approval. This will require the coordinator and all other departments to re-review the request. Upon re-review, the coordinator and all other departments will need to re-approve the request.

## Mayor's Office

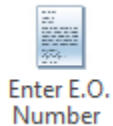
Upon logging in with a user that is part of the Mayor's Office user group, the user will have access to one workflow queue within the COL E.O./D.O. Approval life cycle; **Mayor's Office**.



Once the Mayor has approved the request, the form is then sent to the Mayor's Office queue for review. Within this queue, the Mayor's Office has the capability to add an E.O. Number for the executive order and send the request to the City Clerk.



### Ad Hoc: Enter E.O. Number



The *Enter E.O. Number* task will prompt the Mayor's office to enter an Executive Order Number for each improvement type listed on the Request Form and click **Submit**.

User Interaction

**Please enter the Executive Order:**

Storm EO#

Upon clicking submit a new draft E.O. will be created with the E.O. Number and displayed for the Mayor's Office to review.

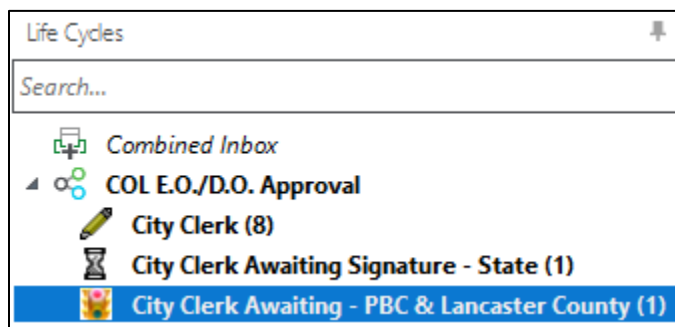
### Ad Hoc: Send to City Clerk



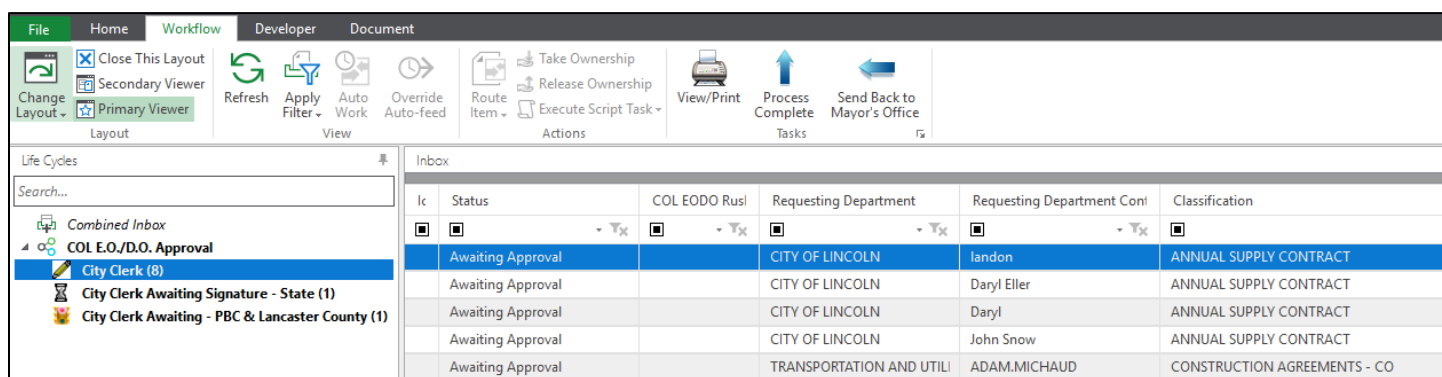
The *Send to City Clerk* task will mark the request form as reviewed by the Mayor's Office and transition the document to the City Clerk queue for further review.

## City Clerk

Upon logging in with a user that is part of a City Clerk user group, the user will have access to three workflow queues within the COL E.O./D.O. Approval life cycle; **City Clerk**, **City Clerk Awaiting Signature - State**, and **City Clerk Awaiting - PBC & Lancaster County**. They will only need to reference the 'City Clerk' queue for all LTU Private Construction Agreements.



The City Clerk will generate the final E.O. and complete the final review or send the request back for further review before completing the process.



## Ad Hoc: View/Print



The **View/Print** task will create the final Executive Order. First OnBase will prompt the user to determine which City Clerk signature is needed to complete the contract. Select a City Clerk Signer from the drop-down and then click **Submit**. If the user selects **Cancel**, the task will not execute and the request will remain in the city clerk queue unchanged.

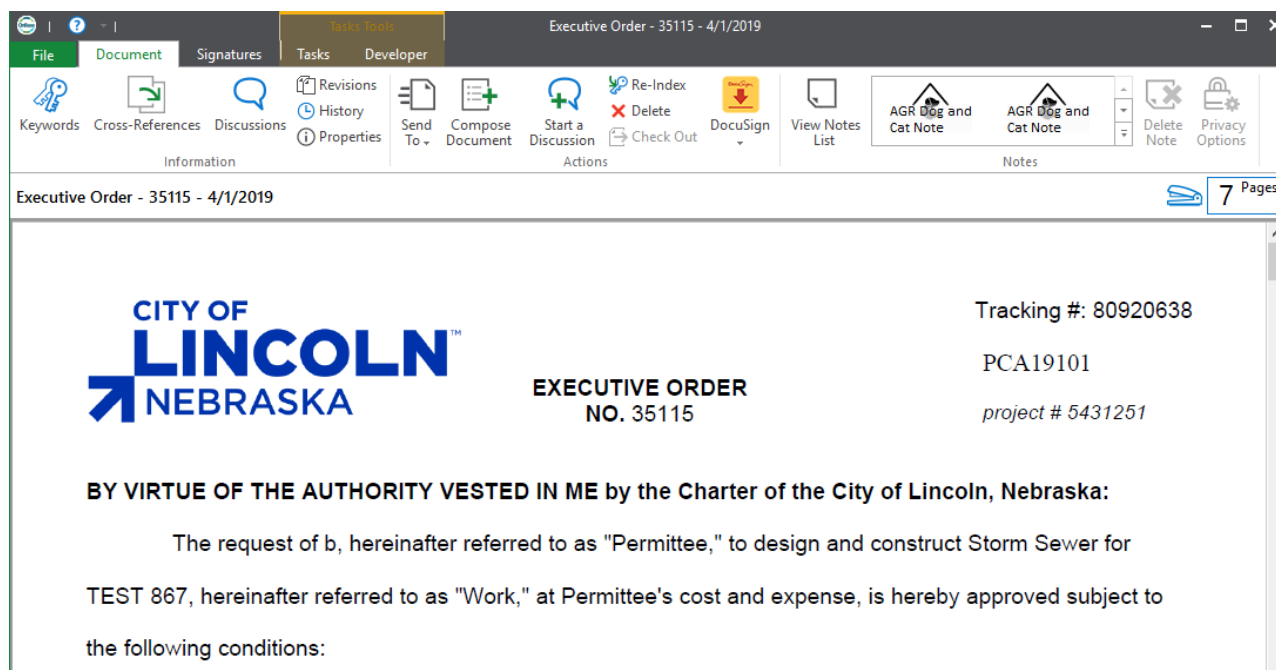
User Interaction

**Please select the City Clerk Signature needed to complete the contract.**

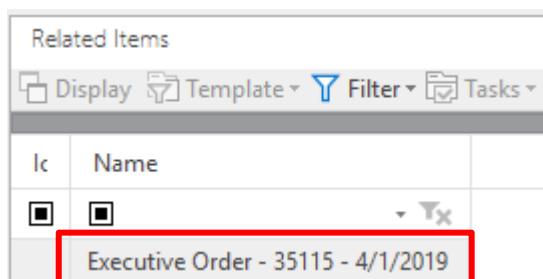
City Clerk Signer: TERESA MEIER

Submit Cancel

If all requirements are met, the final Executive Order will be created. This final Order will merge all supporting documents into one single document and be displayed for the City Clerk to review.



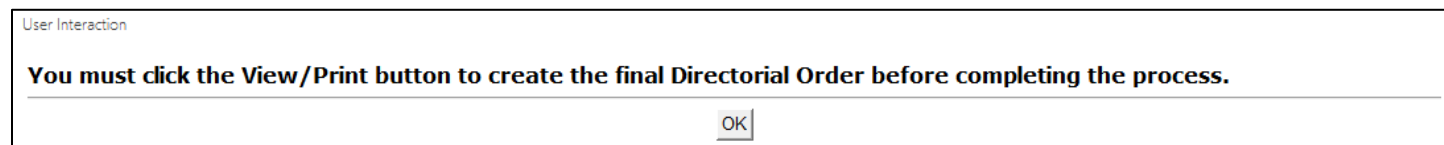
The final Executive Order will also be available to view within the Related Items window of workflow.



Ad Hoc: Process Complete



The *Process Complete* task will check to see if an Executive Order exists, and display a message if one does not. If this is the case, select **OK** and then click the *View/Print* ad hoc task before continuing.



If an Executive Order does exist, the task will finalize the process, set the status to 'Complete', and send the request back to the coordinator for final review in the **COL PCA & PSC Coordination** lifecycle.

## Ad Hoc: Send Back to Mayor's Office



Send Back to  
Mayor's Office

This task will send the request back to the Mayor's Office queue where they would be able to re-review the request, make necessary updates, and then send the request back to the City Clerk for review.

## COL PCA & PSC Coordination

### Coordinator

**Role:** City of Lincoln PCA Coordinator

**Active Directory/OnBase User Group:** COL EODO Coord-LTU PCA

1. Users defined within the **COL EODO Coord-LTU PCA** group will be notified via email when a new Private Construction Agreement Executive Order has been created and sent to their queue for final processing steps.
2. Select the newly created City of Lincoln - Private Construction Agreement - Executive Order from the **Inbox** pane.
3. Select the 'Email Private Construction Agreement EO' ad hoc task.



Email Private Construction  
Agreement EO

4. This task will update Accela with the EO numbers for each improvement type on the Request form and Mayor Signed Date. It will also create a MasterWorks record for each improvement type on the Request form except for Ornamental Lighting.
5. The following scenarios could happen based on connectivity to Accela and MasterWorks:

**Scenario 1 (Most common)** - Accela and Masterworks integrations succeed

Select 'Email Private Construction Agreement EO' - Accela record is updated and MasterWorks record is created. The Executive Order and Request form will be emailed to the appropriate parties.

**Scenario 2** - Accela Integration fails, but MasterWorks Integration succeeds

Select 'Email Private Construction Agreement EO' - The Accela update fails and you receive the following message:

"The Accela update has failed. Would you like to continue with emailing the Executive Order(s) and creating the MasterWorks project? This would require manually updating Accela. Or would you like to cancel and try again at a later time?"

**End Result** if you continued - MasterWorks record is created and Executive Orders are emailed to the appropriate parties. You will need to manually update the Accela record.

**Scenario 3 - Accela Integration succeeds, but MasterWorks Integration fails**

Select 'Email Private Construction Agreement EO' - The Accela update succeeds, but the MasterWorks integration fails and you receive the following message:

"The creation of the MasterWorks project has failed. Would you like to continue with emailing the Executive Order(s)? This would require manually creating the MasterWorks project. Or would you like to cancel and try again at a later time?"

**End Result** if you continued - Accela record is updated and Executive Orders are emailed to the appropriate parties. You will need to manually create the MasterWorks record.

**Scenario 4 - Accela and MasterWorks Integrations fail**

Select 'Email Private Construction Agreement EO' - The Accela update fails and you receive the following message:

"The Accela update has failed. Would you like to continue with emailing the Executive Order(s) and creating the MasterWorks project? This would require manually updating Accela. Or would you like to cancel and try again at a later time?"

Then the MasterWorks integration fails and you receive the following message:

"The creation of the MasterWorks project has failed. Would you like to continue with emailing the Executive Order(s)? This would require manually creating the MasterWorks project. Or would you like to cancel and try again at a later time?"

**End Result** if you continued - Executive Orders are emailed to the appropriate parties. You will need to manually update the Accela record and manually create the MasterWorks record.

6. The Executive Order and Request form will be sent to the following contacts:
  - a. Permittee
  - b. Engineer
  - c. Invoice Contact
  - d. Additional Contacts Listed on Request form
  - e. [esteffen@les.com](mailto:esteffen@les.com)
  - f. [jgarver@les.com](mailto:jgarver@les.com)
  - g. [mweskamp@les.com](mailto:mweskamp@les.com)