



SiteXchange

UCM User Guide For SiteXchange

Version 1.0

Table of Contents

| | |
|---|----------------|
| <u>Accessing UCM for SiteXchange Contract Files</u> | <u>Page 02</u> |
| <u>Searching for a SiteXchange Contract File</u> | <u>Page 03</u> |
| <u>Checking Out a Contract File</u> | <u>Page 04</u> |
| <u>Unlock (Undo) a Checked Out file</u> | <u>Page 05</u> |
| <u>Checking In a Document</u> | <u>Page 06</u> |

*** To accommodate the processing of SiteXchange contract files in UCM, a profile per contractor was created specifically for this purpose. Additional UCM system content and definitions that are not needed for this process is not included nor explained in this document.*



Important Information

- ❖ There is one UCM SiteXchange profile account per company.
 - Any ITAP, SiteXchange Contract File Access registered company user can check in/out any file for that company.
- ❖ Files cannot be deleted by an external user.
 - Send an email to subcontractreview@indot.in.gov to request file deletion if necessary.
- ❖ Files available in UCM
 - Contract files created on or after November 25, 2014 should be available in UCM.
 - Send an email to subcontractreview@indot.in.gov to request an older or missing contract file.
 - New contract files (imported) should be available in UCM after 5:00 am daily.
- ❖ UCM file export process.
 - The process will only export revision number [2] or greater of the latest contract files checked in daily.
 - Process runs once between 6:00pm – 7:00pm daily.
- ❖ UCM file Check In
 - **Do Not** use the “Check In Similar” option. This will create a new file with a revision number of [1] that will not be exported.
 - Files “Checked In” that are not “.CON” will be ignored by the SiteXchange import/export process.

Accessing UCM for SiteXchange Contract Files

To access UCM, log in to ITAP <http://itap.indot.in.gov>.

- ⊕ Scheduling Project Management System
- ⊕ Security Buddy
- ⊕ Site Manager User Request
- ⊕ **SiteXchange Contract File Access**
- ⊕ Situational Awareness
- ⊕ SMGR Reports
- ⊕ SubContractor Payment Tracking(Prime Contractors Only)

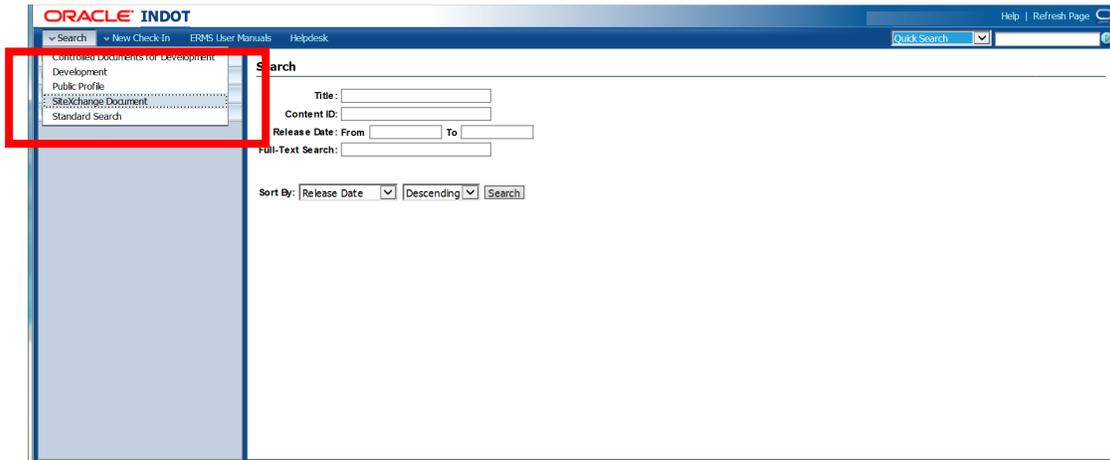
Select the **UCM URL** to search, check in and check out SiteXchange contract (.con) files.

| | |
|--------------|---|
| Name | SiteXchange Contract File Access |
| UCM URL | Click here to access application |
| Description | The SiteXchange® Application is an electronic system that allows the Prime contractor to add subcontractor data that was previously collected |
| Abbreviation | |



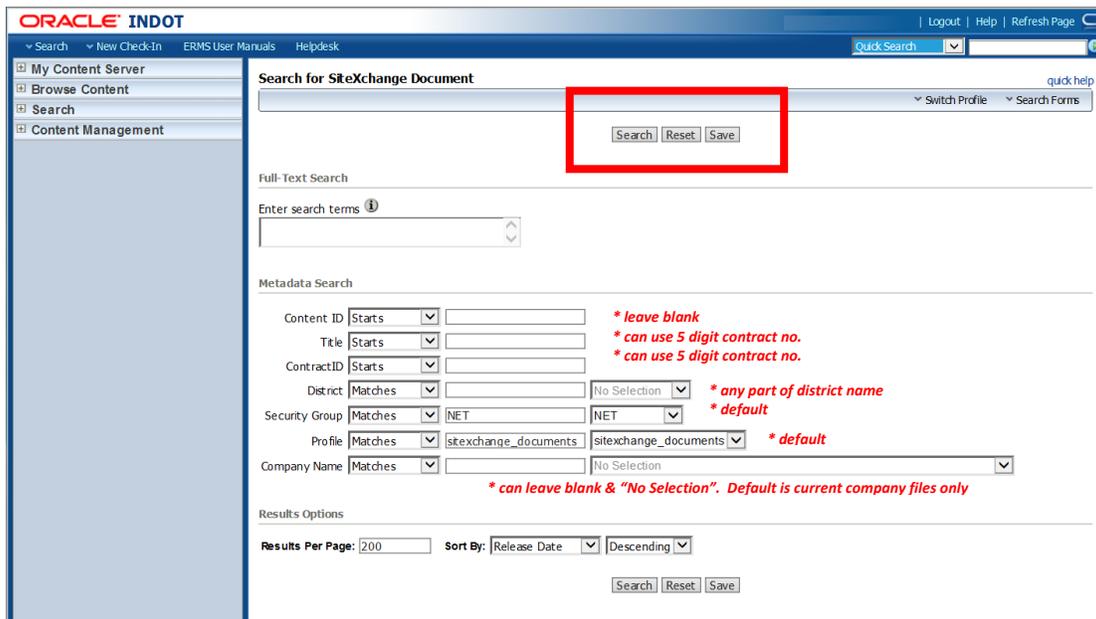
Searching for a SiteXchange Contract File

The default UCM page is displayed below. Select “SiteXchange Document” from the search dropdown.



Options:

- Search – returns all company files
- Reset – clears field entries
- Save (not available)





Search Options

Metadata search can include of the items listed on the page: Content ID, Title, ContractID, District or Company Name. The Security Group and Profile are selected by default and need not be changed.

Selecting “Search” with no additional options will return all “.con” files of the company associated with the current logged in user.

Search Results

On the search results page you will see a row for each document found that will list out the metadata associated with the type of document that was searched for.

Search Results Items 1-200 of 10728

Search Form--> Search Results

Page 1 of 5

| Content ID | Title | ContractID | District | Security Group | Profile | Company Name | Actions |
|-----------------------------|-----------------------|------------|----------|----------------|-----------------------|---------------------------|---------|
| DOT_4649350 | T__38520_20160720.CON | 38520 | Seymour | NET | sitexchange_documents | Midwestern Electric, Inc. | |
| DOT_4649354 | T__38523_20170127.CON | 38523 | Seymour | NET | sitexchange_documents | Midwestern Electric, Inc. | |
| DOT_4649360 | T__38958_20160512.CON | 38958 | Seymour | NET | sitexchange_documents | Shambaugh & Son, L.P. | |
| DOT_4649362 | T__38965_20160309.CON | 38965 | Seymour | NET | sitexchange_documents | Hummel Electric, Inc. | |

| Content ID |
|-----------------------------|
| DOT_4671477 |
| DOT_4671453 |

The Content ID links on the left side of the row will allow you to open or save a copy of the **latest version** contract file to your computer. The standard “Check-Out” procedure will still need to be performed before an updated file can be checked back in.

Click the blue “i” icon at the end of the row to proceed with file check-out procedure on the Content Information page.

Checking out a Document

The process of checking out a file is completed on the Content Information page. To upload an updated contract file you must first “**Check-Out**” the file. To check out a file, click on the “Content Actions” option in the upper right menu bar for the page.

All available revisions of the selected “.con” file will be listed. The file number with the brackets “[#]” is the currently selected file to be Checked Out.

| Revision | Release Date |
|----------|----------------|
| [5] | 4/6/18 9:50 AM |
| 4 | 4/6/18 9:47 AM |
| 3 | 4/6/18 9:29 AM |
| 2 | 4/6/18 9:28 AM |
| 1 | 4/6/18 9:26 AM |



Content Information

Title: R__35435_20171117.CON
Content ID: INDOTDEV_1658524
Account: NET/stexchange_documents/CSLT_HCI
Author: [CSLT_HCI](#)
Revision: 5
Security Group: NET
Profile: stexchange_documents
ContractID: 35435
District: Greenfield
Company Name: HIS Constructors, Inc
Exported: Yes
Checked Out By:
Status: Released
Formats: Application/con

Full Information **Content Actions** E-mail

Content Actions
 Check Out

Links

Web Location: https://IOTECMD06VW.state.in.us:16201/cs/groups/net/@net/@stexchange_documents/@cslt_hci/documents/stexchange_documents/d8x/nju4/~edisp/indotdev_1658524.con
Native File: [R_35435_20171117.CON](#)

| Revision | Release Date | Expiration Date | Status | Actions |
|-------------------|----------------|-----------------|----------|------------------------|
| [5] | 4/6/18 9:50 AM | None | Released | Delete |
| 4 | 4/6/18 9:47 AM | None | Released | Delete |
| 3 | 4/6/18 9:29 AM | None | Released | Delete |
| 2 | 4/6/18 9:28 AM | None | Released | Delete |
| 1 | 4/6/18 9:26 AM | None | Released | Delete |

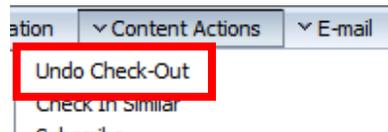
Content Actions menu options. (Other options are not applicable)

- **Check Out** – Check out the document.

To check out the document, select the “Check Out” option. The file will remain locked until a new version is Checked In or until the **Undo Check-Out** option is used.

Unlock (Undo) a Checked Out file

Go to the content information page for the checked out file. Select **Undo Check-Out** from the Content Actions menu.



To download a copy of another revision, first select the revision number, then the “Native File” link.

| Revision | Release Date |
|-------------------|----------------|
| [5] | 4/6/18 9:50 AM |
| 4 | 4/6/18 9:47 AM |
| 3 | 4/6/18 9:29 AM |
| 2 | 4/6/18 9:28 AM |
| 1 | 4/6/18 9:26 AM |

Links

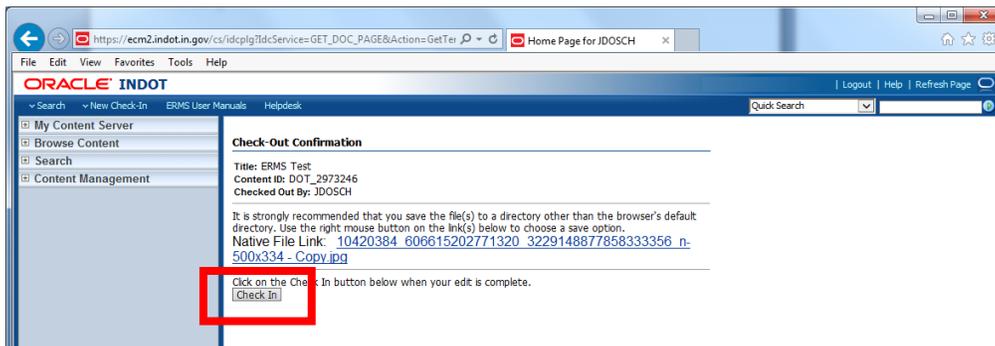
Web Location: <https://IOTECMD06VW.state.in.us:16201/cs/groups/net/@net/>
Native File: [Penguins.jpg](#)

| Revision | Release Date |
|----------|-----------------|
| [1] | 3/5/18 10:47 AM |



After checking out the document a confirmation screen is displayed. It also provides a link to download the currently selected native file. Clicking on this link will open an “Open/Save” dialog box at the bottom of your browser.

You can check in the document by clicking the **Check In** button on the page.



Checking In a Document

After successfully searching for and locating the file to “Check In”. Click the blue “i” icon at the end of the row to proceed with file check-in procedure on the Content Information page.

Search Results Items 1-200 of 10728

Search Form--> Search Results

Page 1 of 5

| Content ID | Title | Contract ID | District | Security Group | Profile | Company Name | Actions |
|-----------------------------|-----------------------|-------------|----------|----------------|-----------------------|---------------------------|---------|
| DOT_4649350 | T__38520_20160720.CON | 38520 | Seymour | NET | sitexchange_documents | Midwestern Electric, Inc. | |
| DOT_4649354 | T__38523_20170127.CON | 38523 | Seymour | NET | sitexchange_documents | Midwestern Electric, Inc. | |
| DOT_4649360 | T__38958_20160512.CON | 38958 | Seymour | NET | sitexchange_documents | Shambaugh & Son, L.P. | |
| DOT_4649362 | T__38965_20160309.CON | 38965 | Seymour | NET | sitexchange_documents | Hummel Electric, Inc. | |

Select “Check-In” from the Content Actions menu.

Content Information

Full Information | Content Actions | E-mail

Title: R_35435_20171117.CON
 Content ID: INDOTDEV_1658524
 Account: NET/sitexchange_documents/CSLT_HCI
 Author: [CSLT_HCI](#)
 Revision: 5
 Security Group: NET
 Profile: sitexchange_documents
 Contract ID: 35435
 District: Greenfield
 Company Name: HIS Constructors, Inc
 Exported: Yes
 Checked Out By:
 Status: Released
 Formats: Application/con

Content Actions | E-mail

- Undo Check-Out
- Check In**
- Check In Similar
- Subscribe
- Add Attachments
- Add to Folder
- Add to Folder as Short Cut

Links

Web Location: https://jotecom06vw.state.in.us:16201/cs/groups/net/@net/@sitexchange_documents/@cslt_hci/documents/sitexchange_documents/dl8x/nju4/~edisp/indotdev_1658524.con
 Native File: [R_35435_20171117.CON](#)

| Revision | Release Date | Expiration Date | Status | Actions |
|----------|----------------|-----------------|----------|------------------------|
| [5] | 4/6/18 9:50 AM | None | Released | Delete |
| 4 | 4/6/18 9:47 AM | None | Released | Delete |
| 3 | 4/6/18 9:29 AM | None | Released | Delete |
| 2 | 4/6/18 9:28 AM | None | Released | Delete |
| 1 | 4/6/18 9:26 AM | None | Released | Delete |



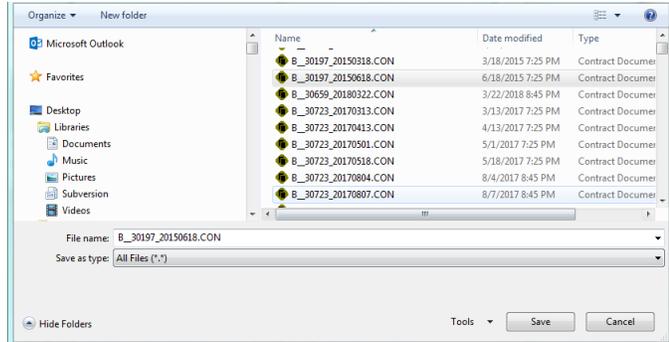
Check-In page Screen Content Page

Content Check-In Form

*** Title Placeholder**
 Content ID INDOTDEV_1651958
 Account NET/sitexchange_documents/CSLT_SCCI
 * Author
 * Revision 3
 * Security Group NET
 Profile sitexchange_documents
 ContractID R -36373
 District Crawfordsville
 Company Name Superior Construction Co., Inc.
 Exported No

* Original File Lighthouse.jpg

* Primary File



Click "Browse" to locate the contract file to check in on your computer. Click

Upon successful upload a confirmation window should be displayed.

Check-In Confirmation for 'Generate.txt'

Content ID: INDOTDEV_1658750
 Title: Generate.txt
 Checked in by:

You may check in a new document with similar attributes

The [Content Info](#) link will take you back to the Content Information page where your files should be displayed.

Support

Technical Issues

- subcontractreview@indot.in.gov (Subcon file and Subcon.exe issues)
- Sctcrequest@indot.IN.gov (ITAP and UCM issues)

Contract File Approval Questions

- Email appropriate district Economic Opportunity Officer