

Oklahoma Department of Transportation



Engineering Contract Solicitation Response System User Guide

April 24, 2014

Background: This system was built to provide a new way for Consultant Engineering companies to submit their Letters of Interest (response packet). In the past, these pdf files were submitted via email to ODOT. Issues such as file sizes being restricted by email systems caused problems for the users, along with quota restrictions for the receiving in-box were things that we wanted to alleviate. This new system was designed with a basic requirement in mind - the user wants to submit a response to a solicitation in as simple a manner as possible. System authentication (logging in with appropriate credentials) and system authorization (being able to run appropriate processes) have been built into the design of the system to make sure the contracting community can perform the needed tasks.

In order to submit a response file, the user must register with the system and create a userid. The first person to do so for the company name will become the administrator for that company profile. Additional users can register with that company, and the administrator must grant access to those new users to work on behalf of the company.

Also, there is a browse feature for the system where the user does NOT have to log in with a userid. This feature will allow casual users to see the solicitation documents.

Main steps to use the system:

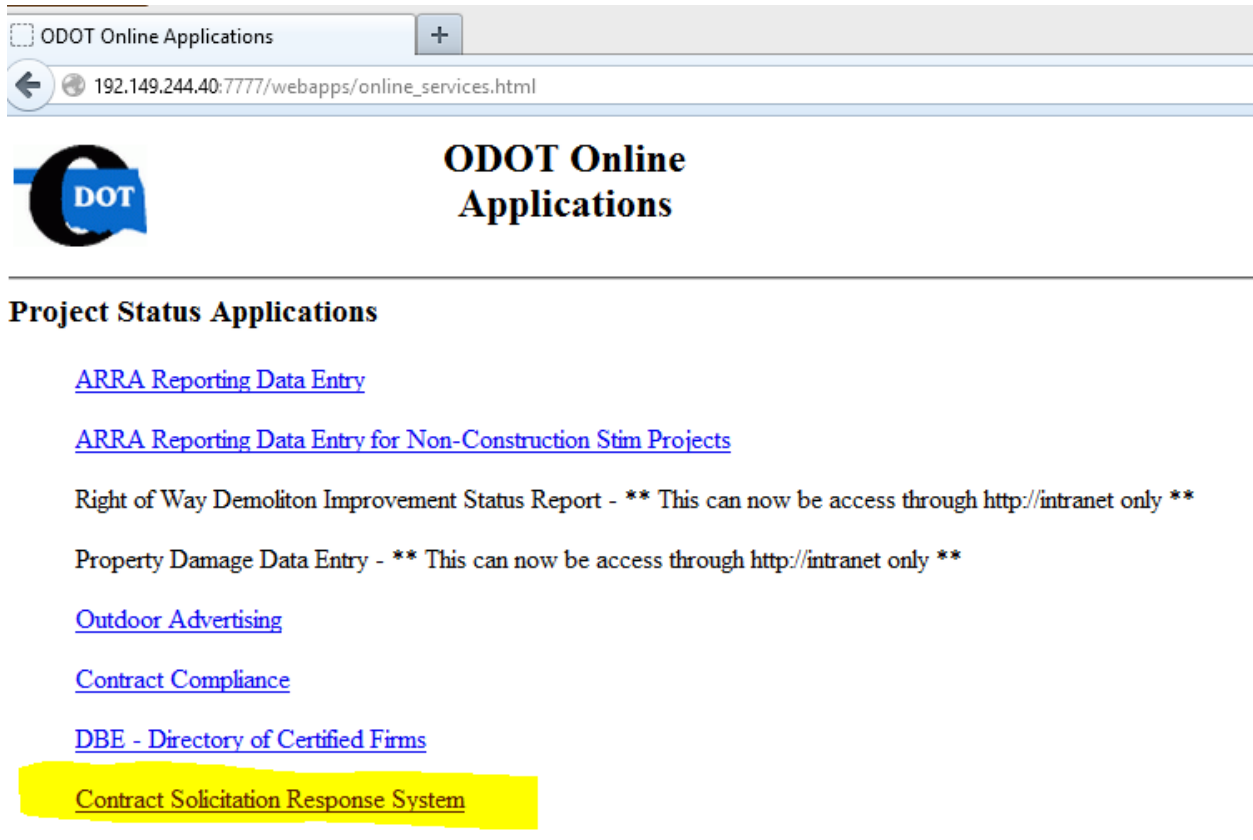
- 1) Register as a user – specify your company
- 2) Retrieve your temporary password from your email
- 3) Log in and change the password
- 4) Verify your user account and company profile
- 5) Respond to Solicitation Requests

Main steps to respond to requests:

- 1) Log in to your account
- 2) Identify the correct solicitation
- 3) Identify the correct EC project
- 4) Upload your response document (PDF)

Step 1: Navigate to the initial page

http://192.149.244.40:7777/webapps/online_services.html



ODOT Online Applications

Project Status Applications

[ARRA Reporting Data Entry](#)

[ARRA Reporting Data Entry for Non-Construction Stim Projects](#)

Right of Way Demolition Improvement Status Report - ** This can now be access through <http://intranet> only **

Property Damage Data Entry - ** This can now be access through <http://intranet> only **

[Outdoor Advertising](#)

[Contract Compliance](#)

[DBE - Directory of Certified Firms](#)

[Contract Solicitation Response System](#)

Click on the Contract Solicitation Response System link. If this is your initial access into the system, you need to establish your user account.

Step 2: Create a Userid

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Contract Solicitation Response System

About this page

This is the portal to the Engineering Contract Solicitation site for ODOT. In order to submit a Letter of Interest, you need to have an account for your Company and obtain a userid that is authorized to act on behalf of that Company. If you already have a userid, then login and proceed to the site. If you don't have a userid, click on the link that allows you to create one. If you are the first userid for the Company, then you will be set as the Primary Company Account Manager and will be able to manage any other users who request access to act on behalf of the Company. Complete all of the fields when requesting a userid, submit your request, and check your email for additional instructions.

Don't have a userid?

Click on this button to view the solicitations, but you can NOT submit a response via this button.

[View Solicitations](#)

Or, if you want to be able to submit a response packet, you must register with the system using this button... [Create A New Userid](#) ...and then come back here and log in with your userid. You only need to register 1 time to get your userid.

This link brings up a page that will allow you to register as a user, and if you are the first one to specify a company name, you will become the company profile administrator. Enter all of the fields in the screen to set up your userid.

The company profile administrator can be changed by the current company profile administrator or the IT Staff at ODOT, or the Contract Administration Staff.

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- Step 1)** Complete this form and submit your request.
 - Step 2)** Go to your email and look for the message from this process.
 - Step 3)** Follow the link to log in using the userid and password in the email. You will be asked to change your password.
 - Step 4)** You can then log in and begin using the system.

Contract Administration Access Request

Company Name

First Name Middle Last Name

Street

City

Oklahoma City, Tulsa, Norman, Edmond, Moore

State

OK

Zip
 include the dash if entering zip + 4

Email

Phone
 Enter as 9999999999

Title

User Name / User ID (this will be your login id - please do not use spaces in the name)

After you click the submit button, the system will create your user account, and then it will send a message to your email address that contains a temporary password. Go and retrieve that email message and then come back to the initial screen so you can log in with your userid and that temporary password. You will be prompted to change the password.

If your email link doesn't work, just come back to this page in your browser and log in with your userid:

<http://192.149.244.40:7777/apex/f?p=604>

After you change your password to your permanent one, you will have to come back through the logon process again. Once you do that, your screen should look like the one below:



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Contract Solicitation Response System

Contract Solicitation

[Change Password](#) [Logout](#)

[Home](#)

- [View Contract Solicitations](#)
- [Express Upload](#)
- [View Solicitation Results](#)
- [View My Contracts](#)

General Message

Welcome to the ODOT Engineering Contract Solicitation System.

We are in a development and testing phase for a new system to help you upload and track your response files.

There is a **Mock Solicitation** that is provided to help you become familiar with the functions of the system. Feel free to work with this solicitation to learn how to upload your response file, and see how the query functions work for the various reports. We plan to offer training sessions that use this solicitation as a way to get the community started using the system.

My Uploaded Letters of Interest (Response Packet):

Authorized to act on behalf of Company Name: ICFI

Solicitation Name	Solicitation Response Due	EC Number	Services Description	Name	Company Name	My File Name	Uploaded Date	My Document	Short Listed	Selected For Contract	Company Project ID
Mock Solicitation	28-SEP-25	9722	Preliminary Engineering, Preparation of Construction Plans	PHILIP - PHILIP WALLACE	ICFI	2013.05.06 - EC-1448 LOI Myers.PDF	08-SEP-13 08:38:16.000000 AM	Download	No	-	-

Getting around in the system – navigation elements: Key features that will make the user experience less frustrating begins with understanding the navigation elements.

Your home page has a menu navigation block in the upper left corner of the screen. Links in this block take you to various pages that help you manage your data. Each of those links will be covered in more detail in this document. Other features are identified here so that you get an understanding of where to look for those components that make the web site easier to work with.


We start off by bringing your attention to the breadcrumb region of the page. That is the portion where links appear as you move deeper into the web site structure that will help you get back to where you started (or anywhere along the way). Here is an image of what this region might contain:



As you can see, the current page breadcrumb entry is at the end of the string, with the greater than sign between the entries. Each portion of the breadcrumb is a link that will take you back to a specific page that you visited.

We also use icons that represent “edit a specific record”



The screenshot shows a table with three columns: "Solicitation Name", "EC Number", and "Services Description". The first row of data is highlighted in blue and includes a pencil icon in the first column. The data in the row is: "January 2014", "1496", and "On-Demand Aerial LIDAR Mapping".

Solicitation Name	EC Number	Services Description
 January 2014	1496	On-Demand Aerial LIDAR Mapping


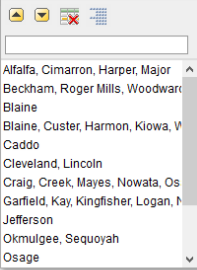



That icon (the pencil and paper) is typically on the left side of the screen on each record when you are allowed to edit it. It is the method we use to navigate to the page used for data entry.

Another icon you will see represents the “view” or “drill-down” function. This works like the edit icon, but is used to move into a page that may not have editable fields.

Listing of Available Solicitations

View EC Details	Solicitation Status	Solicitation Name	Download Requirements Packet	Solicitation Response Due Date
	OPEN	January 2014	Download	14-FEB-14
	OPEN	Mock Solicitation	Download	28-SEP-25

Filter and sorting Options: Another feature you need to be aware of is the ability to filter the report section of some of the pages so you only see specific records. That feature lives in the “grey bar” that holds links for specific things. Any time you see this bar, you should know how to help limit the amount of data that is being displayed:

Solicitation Name	EC Number	Services Description	Work Type Description	No of Anticipated Contracts	Division	County Name	DBE Goal %	Contract Type	Requirements Desc
 January 2014	1496	On-Demand Aerial LIDAR Mapping	On-Demand Aerial LIDAR Mapping	1	Multiple			Task Order	The anticipated services will include, but are not limited to, providing survey-grade mapping using a Aerial LIDAR (Light Detection and Ranging) Sensor, Inertial Motion Unit (IMU), Global Posti...
 January 2014	1497	Preliminary Engineering, Preparation of Construction Plans (Design Survey)	Design Survey	10	Multiple			-	I-40B OVER ELK CREEK, 0.15 MI. E. OF SH-6 IN ELK CITY SH-6 OVER SADLER CREEK, 1.7 MI. N. OF SH-55 WEST JCT US-283 BRIDGE OVER DEAD INDIAN CREEK, 7.4 MI. N. OF SH-47 <...
 January 2014	1498	Preliminary Engineering, Preparation of Construction Plans	Bridge & Approaches	2	1			-	US-75 BRIDGES AT US-75/SH-16 JCT, 9.84...
 January 2014	1499	Preliminary Engineering, Preparation of Construction Plans	Bridge & Approaches	2	3			-	SH-9 OVER LITTLE RIVER, 12.3 MI. E. OF US-77 SH-66B OVER CAPTAIN CREEK, 1.5 MI N.E. OF SH-66 The anticipated services will include the Environmental, Geotechnical Informatio...
		Preliminary							US-60 OVER BNSF RR APPROX. 0.9 MI. N. OF

If you click on the column headings in that bar, a small window will open that allows you to filter the data based on the value you select in the list. Also, you can sort the data as well as create control breaks for the data values in this column. Once you work with this user interface a bit, it will be very easy for you to operate.

Your company profile: The company profile specifies which user accounts are authorized to submit files on behalf of the company. From your home page, you can click on the edit icon for the company (if you are the company profile manager, you will be allowed to edit the data). That will take you into a page similar to the one shown below.

Home > [Edit My Company Info](#)

Edit My Company Info

Company Name: ICFI

Street

Address

Address2

Address3

City

State

Zip include - (dash) if zip + 4



Email

Phone example: 9999999999 Enter as numbers ONLY.

Primary Company Profile Manager The User Primary Account Manager value must be a "Y" to appear in this list.

Created Date: 27-AUG-13

Users Authorized to act on behalf of My Company

Edit	User Name	First Name	Last Name	Address	City	State	Zip	Email	Phone	Title	Self-Serv Company Name
	CORBIS4OU	CORBI	JENKINS	7425 NW 116TH STREET	OKLAHOMA CITY	OK	73162	corbis4ou@cox.net	405-470-1765	ASSISTANT TO THE CIO	ICFI
	PHILIP	PHILIP	WALLACE	11601 KINGS RD	MEEKER	OK	74855	PWALLACE@ODOT.ORG	405-522-1082	-	ICFI

Uploading a response packet: The goal of the system is to make uploading a response file simple and quick. In order to do this, you must understand ODOT’s numbering scheme for the projects. Each project has an identifier that we call the EC number. Each EC was assigned to a specific solicitation. You must understand that relationship exists so you can navigate to the appropriate page in the system.

Once you know which solicitation you are working with, and which project within that solicitation you need to submit a response file for, you can use the navigation links to help you get to the right page.

There are 2 methods to upload your documents. The first one takes you through screens to help you make sure you are working with the correct solicitation and the correct EC number. Visual clues on those pages should help you be sure that you are submitting the document for the specific project you are interested in.

Another method exists that will probably be used more often after you become familiar with the system. That is the Express Upload option. It will be covered later in the guide.



The link for **View Contract Solicitations** will take you to a page that shows the Open Solicitations. You will only be allowed to submit a response to an EC when the associated solicitation is in an Open status. The page should appear similar to this:

Home > [List All Solicitations](#)

Important Messages

Solicitation Name	Message
Mock Solicitation	This is a simulated EC Solicitation. It can be used by the Contracting Community to become familiar with the functions of the system. Feel free to upload test documents as y contained in this solicitation. ODOT conducts scheduled training sessions for the community using this solicitation - check the training calendar for the next session and ma

Listing of Available Solicitations

View EC Details	Solicitation Status	Solicitation Name	Download Requirements Packet	Solicitation Response Due Date	Description	Contract Administrator	Mailing Address	Mailing Address2
	OPEN	January 2014	Download	14-FEB-14	January 2014	Kathy Hurst	Room 3-C9	Oklahoma Department of Transportation
	OPEN	Mock Solicitation	Download	28-SEP-25	Simulated Solicitation for demonstrating and learning the system functions.	Michelle Roberts	Project Management Division	Room 1C-4A

Areas that we cover here are the Important Messages, the View EC Details, and the Download link. They have been highlighted in the image for you.

Important Messages may be updated by ODOT staff to communicate urgent messages to the contracting community. Watch this area for any updates.

The Download link will allow you to download the pdf file that contains the solicitation document distributed by ODOT. This is the same document format that has been used in the past, and contains a list of all of the projects (EC numbers) that are on the specific solicitation.

The View EC Details icon will drill down into a list of all of the EC numbers that are represented by the solicitation. Click on this link to open that page and see the individual projects that exist as part of that group.

This image represents a list of the EC numbers that exist on the Mock Solicitation. Notice that the Solicitation Name and Due Date are highlighted here to get your attention. And, the edit icon exists to allow you to provide data in some way – in this case, you will be submitting your response file. Also, notice the EC Number along with descriptive text to help make sure you are responding to the correct project.

The screenshot shows a web interface for a solicitation. At the top right is a 'Home' button. Below it is a breadcrumb trail: 'Home > List All Solicitations > List Solicitation with Contract Info'. The main content area is divided into two sections. On the left, under 'List Solicitation with Contract Info', there is a 'Return' button and a 'Solicitation Messages' button. Below this, the 'Solicitation Name' is 'Mock Solicitation' and the 'Solicitation Submission Due Date' is '28-SEP-25'. The description is 'Simulated Solicitation for demonstrating and learning the system functions.' and the status is 'OPEN'. On the right, a 'MESSAGE' box contains text: 'This is a simulated EC Solicitation. It can be used by the Contracting Community to become familiar with the functions of the system. Feel free to upload test documents as your response to some of the test contract items that are contained in this solicitation. ODOT conducts scheduled training sessions for the community using this solicitation - check the training calendar for the next session and make plans to participate.' Below these sections is a table with the following columns: Solicitation Name, EC Number, Services Description, Work Type Description, No of Anticipated Contracts, Division, County Name, DBE Goal %, Contract Type, and Requirements Desc. The table lists three mock solicitations: 9721 (Muskogee), 9722 (Okmulgee), and 9723 (Adair). Each row has a magnifying glass icon next to the solicitation name.

Solicitation Name	EC Number	Services Description	Work Type Description	No of Anticipated Contracts	Division	County Name	DBE Goal %	Contract Type	Requirements Desc
Mock Solicitation	9721	Preliminary Engineering, Preparation of Construction Plans	Grade, Drain, Bridge, & Surface	1	1	Muskogee	6	-	US-266: FROM THE MCINTOSH COUNTY LINE, EAST 2.93 MILES TO SH-2 (INCLUDES BENNETT CREEK BRIDGE) The anticipated services will include the Environmen...
Mock Solicitation	9722	Preliminary Engineering, Preparation of Construction Plans	Intersection Modification	2	1	Okmulgee	6	-	US-75: SAFETY IMPROVEMENT FROM APPROXI...
Mock Solicitation	9723	Preliminary Engineering, Preparation of Construction Plans	Bridge & Approaches	1	1	Adair	6	-	SH-51 OVER MULBERRY HOLLOW, 6.6 MILES SE OF CHEROKEE COUNTY LINE The anticipated services will include the Environmental, Geotechnical Information, Preliminary Engin...
Mock	...	Preliminary Engineering	SH-99/US-377 OVER LAKE TEXOMA (WILLIS BRIDGE) The

And, notice that there is a Solicitation Message area where ODOT can send out urgent messages that pertain to just this specific solicitation.

Once you have identified your specific EC Number, click on the edit icon. That will bring up the next page:

Contract
Solicitation

Home > List All Solicitations > List Solicitation with Contract Info > [View Contract Requirements](#)

My Solicitation Response

no data found

Contact Person	Phone
Kirk Goins	405-521-2695
1 - 1	

View Contract Requirements

Solicitation Name: Mock Solicitation
EC Number: 9721
Services Description: Preliminary Engineering, Preparation of Construction Plans
Work Type Description: Grade, Drain, Bridge, & Surface
Anticipated Contracts: 1
Division: 1
County Name: Muskogee
DBE Goal %: 6
Contract Type:
Requirements Desc:
US-266: FROM THE MCINTOSH COUNTY LINE, EAST 2.93 MILES TO SH-2 (INCLUDES BENNETT CREEK BRIDGE)

Items of interest on this page include the Solicitation Name, EC Number, Services Description, and County Name. A text description of the project also exists that identifies where the project is located. These elements should help you make sure that your submission is for the correct project. And, the button that is highlighted above (Submit My Response Packet) will take you to the page where you can specify your file that needs to be uploaded. Click on that button.

Contract
Solicitation

Home > List All Solicitations > List Solicitation with Contract Info > View Contract Requirements > [Manage My Solicitation Response Record](#)

Edit My Solicitation Response Record

Solicitation Status: OPEN

User Name Submitting This Response Packet: PHILIP - PHILIP WALLACE

Authorized to act on behalf of Company Name: ICFI

Solicitation Name and EC Number: Mock Solicitation - 9721

File Name to Submit: No file selected.

My File Type that was submitted:
My File Name that was submitted:
Modified Date for My File:
Company Project Id:

This is the page where you need to verify (again) that you are on the right Solicitation and EC Number.

Your name and company name should be correct at this point also. If they are not, then you need to stop and contact ODOT to get assistance with making sure your submission is correct.

Once you are sure that everything is correct, click on the Browse button to search your PC for the file that you want to upload. Enter that file in the dialog window that comes up, and then you will return to this page. If your company has assigned your own project id to this project, you can enter it in the Company Project Id column (this is optional). Finally, click on the submit button to upload the file to the web site.

The page that returns to you should look similar to this:

Contract Solicitation

Home > List All Solicitations > List Solicitation with Contract Info > [View Contract Requirements](#)

Action Processed.

My Solicitation Response

Date My Response Packet Was Submitted
07-APR-14 01:17:11.000000 PM

ODOT Contacts

Contact Person	Phone
Kirk Goins	405-521-2695
	1 - 1

[View Contract Requirements](#)

Solicitation Name: Mock Solicitation
EC Number: 9721
Services Description: Preliminary Engineering, Preparation of Construction Plans
Work Type Description: Grade, Drain, Bridge, & Surface
Anticipated Contracts: 1

You should see the Action Processed message, and the date and time that your document was uploaded. The Upload button no longer appears, but the Date and Time are a link that will allow you to edit your submission again if you need to. However, the only option will be to delete the file that is on the web site and upload another one.

This is the page that would allow you to delete the old one, or it also will allow you to download your file if you need to.

Contract
Solicitation

Home > List All Solicitations > List Solicitation with Contract Info > View Contract Requirements > [Manage My Solicitation Response Record](#)

Edit My Solicitation Response Record

Cancel

Delete

Solicitation Status:	OPEN
User Name Submitting This Response Packet	PHILIP - PHILIP WALLACE
Authorized to act on behalf of Company Name	ICFI
Solicitation Name and EC Number	Mock Solicitation - 9721
File Name to Submit	<input type="button" value="Browse..."/> No file selected.
My File Type that was submitted:	application/vnd.openxmlformats-officedocument.presentationml.presentation
My File Name that was submitted:	EC-Solicitation.pptx
Modified Date for My File:	07-APR-14
Company Project Id	<input type="text"/>

Download My Submitted Packet

Express Upload: Once you are familiar with the task of uploading your response files, you will probably want to use the Express Upload page. You get to it by using the navigation menu on the home page.

Contract
Solicitation

Home > [Express Upload](#)

Express Upload Cancel Submit My Document

User Name Submitting This Response Packet: PHILIP - PHILIP WALLACE First, make sure this is your userid...

Authorized to act on behalf of Company Name: ICFI Then, verify that this is your company...

Solicitation Name: - Select One - Next, identify which solicitation you are working on...

Which EC?: - Select One - Now, make sure you select which EC you are submitting a response for...

File Name to Submit: No file selected. Locate your file, and then click the Submit button above.

My File Type that was submitted:

My File Name that was submitted:

Modified Date for My File:

Company Project ID: Enter the Company's Project ID here if you have one.

Listing of My Letters of Interest that have been uploaded:

Solicitation Name	<input type="checkbox"/>	<input type="checkbox"/>
Solicitation Name	<input type="checkbox"/>	<input type="checkbox"/>

Notice on this page that you use the drop-down lists to specify the solicitation name (the solicitation must be in the OPEN status for it to appear here) along with the EC number. You use the browse button to search your pc for the file you want to upload, and optionally you can enter your company project id. Once you have the data ready, click on the Submit My Document button. This uploads your response file to the web site. You should be able to submit 1 or more files much more quickly than going through all of the other screens – but you need to make sure you know your solicitation name and EC number. As you upload your files, they should appear in the report list at the bottom of the page. This gives you visual confirmation that you have uploaded your file.

Additional Features:

Additional features that are being developed include making the results of the Solicitation available and a page where the consultant can retrieve an electronic version of their contract. Those pages will work in a very similar manner to those covered in this document.