



## Quick Reference Guide (QRG) Summary of Changes

**Creation Date: 01-20-2026**

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**Revised Date:**

**Revised By:**

**Changes Made:**

# Pre Construction Project Entry

## Section 1: Setting Workflow phase

**Step 1:** On the **Project Summary** screen, click the **Workflow** tab.

Project Summary

▼ Project: 123456789 - test

Proposal:

General Project J/P Number  
123456789

Counties

Districts

Points

Road Segments

Bridge Segments

**Workflow**

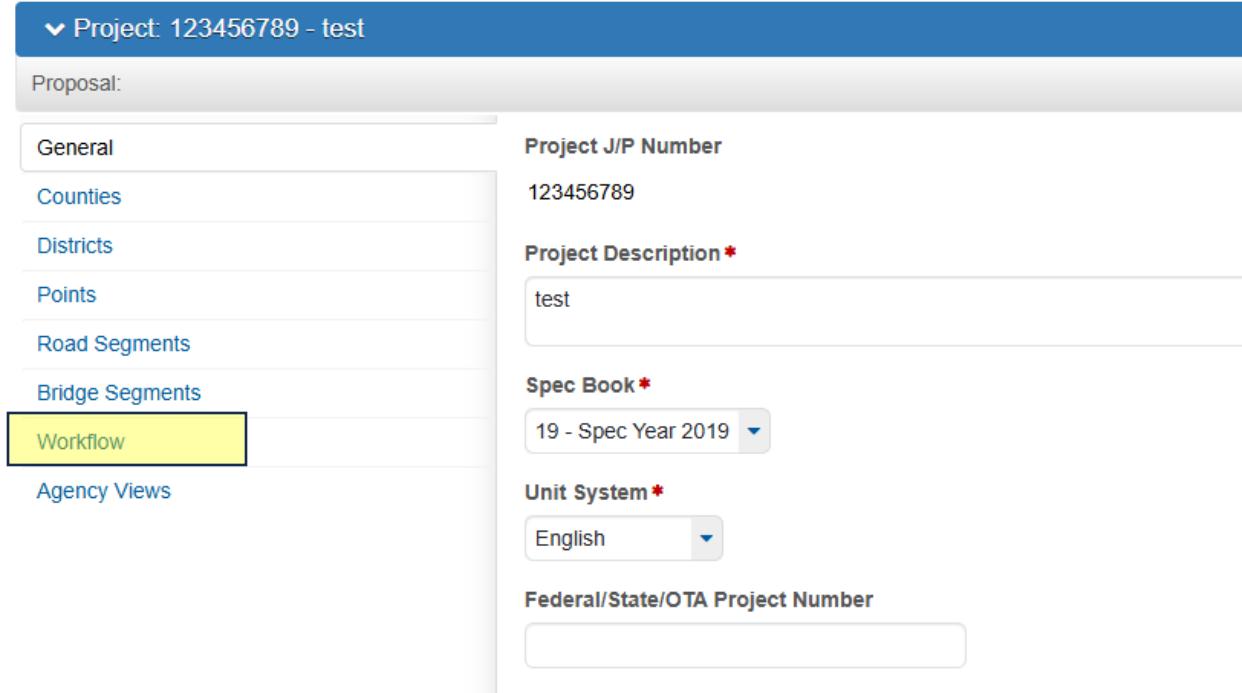
Agency Views

Project Description\*  
test

Spec Book\*  
19 - Spec Year 2019 ▾

Unit System\*  
English ▾

Federal/State/OTA Project Number



**Step 2:** On the **Workflow** tab, select the **Workflow** field by clicking the drop-down arrow.

Project Summary

▼ Project: 123456789 - test

Proposal:

General

Counties

Districts

Points

Road Segments

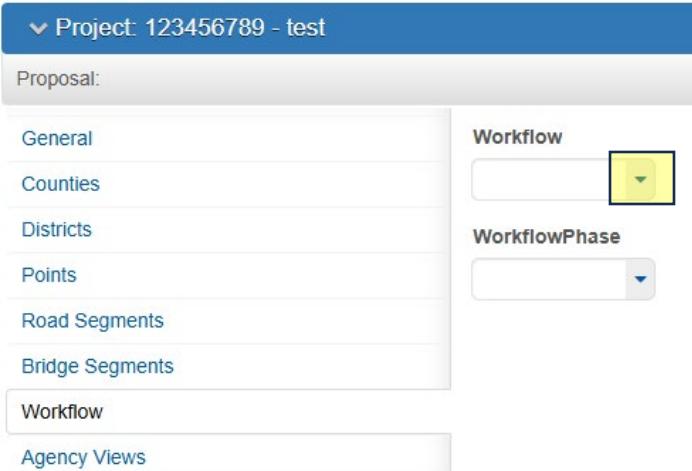
Bridge Segments

**Workflow**

Agency Views

Workflow

WorkflowPhase



**Step 3:** From the **Workflow Drop-Down Menu** select **ODOT Workflow**.

Project Summary

▼ Project: 123456789 - test

Proposal:

General  
Counties  
Districts  
Points  
Road Segments  
Bridge Segments

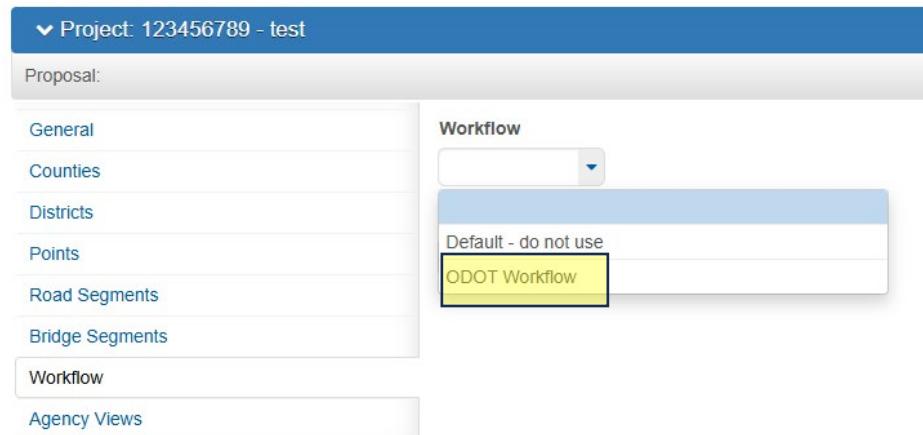
Workflow

Workflow

Default - do not use  
ODOT Workflow

Workflow

Agency Views



**Step 4:** Click the **WorkflowPhase** field drop-down arrow.

Project Summary

▼ Project: 123456789 - test

Proposal:

General  
Counties  
Districts  
Points  
Road Segments  
Bridge Segments

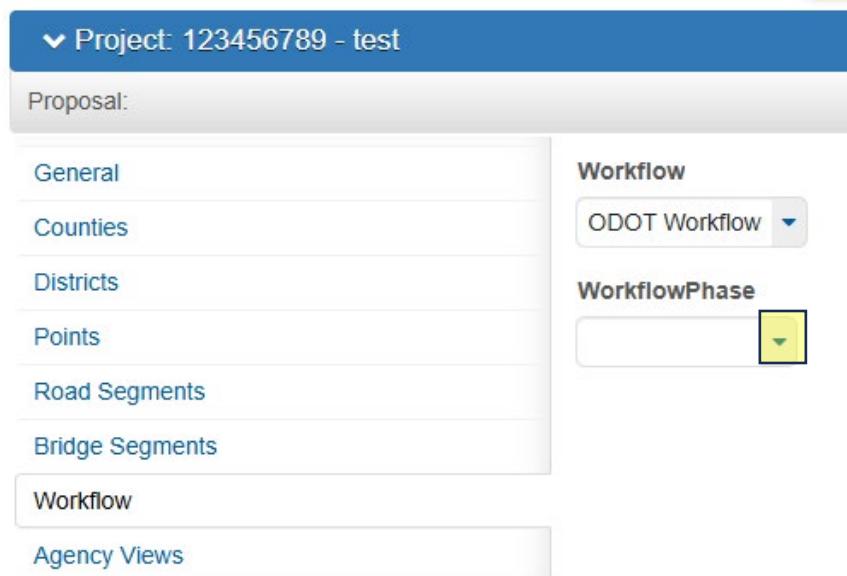
Workflow

Workflow

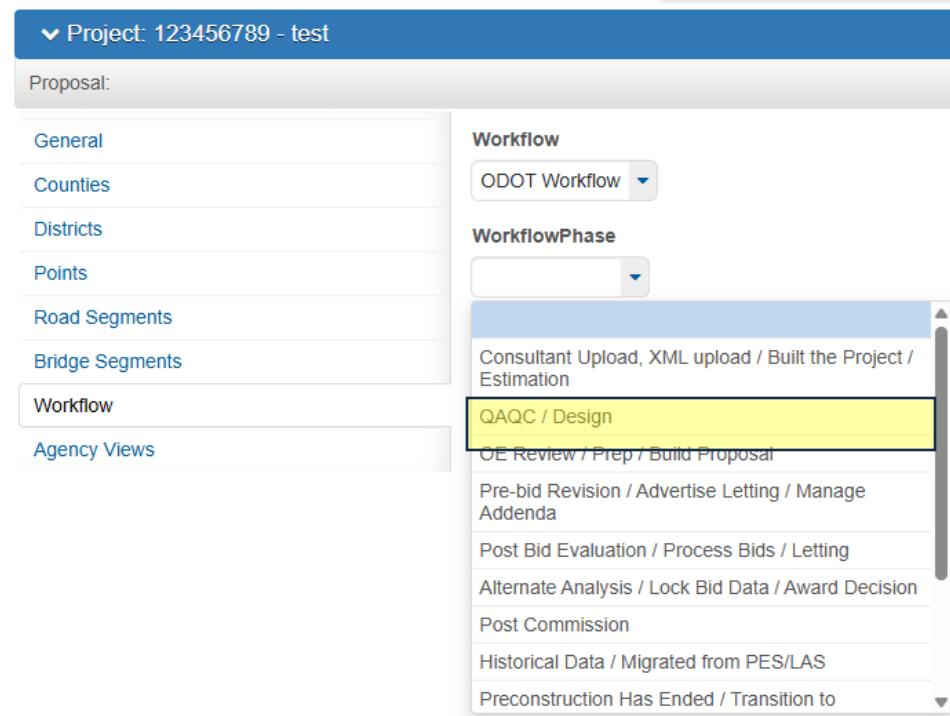
ODOT Workflow ▾

WorkflowPhase

WorkflowPhase



**Step 5:** From the **WorkflowPhase Drop-down Menu**, select **QAQC / Design**.



The screenshot shows a software interface for managing a project. At the top, a blue header bar displays the project identifier "Project: 123456789 - test". Below this, a "Proposal:" label is followed by a list of categories: General, Counties, Districts, Points, Road Segments, Bridge Segments, Workflow (which is selected and highlighted in blue), and Agency Views. On the right, there are two main sections: "Workflow" and "WorkflowPhase". The "Workflow" section shows "ODOT Workflow" selected. The "WorkflowPhase" section is a dropdown menu with the following options: Consultant Upload, XML upload / Built the Project / Estimation, QAQC / Design (which is highlighted with a yellow background), O&E Review / Prep / Build Proposal, Pre-bid Revision / Advertise Letting / Manage Addenda, Post Bid Evaluation / Process Bids / Letting, Alternate Analysis / Lock Bid Data / Award Decision, Post Commission, Historical Data / Migrated from PES/LAS, and Preconstruction Has Ended / Transition to.

**Step 6:** Click the **Save** button.



## Section 2: Entering Project Information

### (General Tab)

**Step 1:** On the **General Tab** fill out any information needed in the system non-required fields.  
(Screen Shot of Fields that could need information added)

Project J/P Number 123456789	Urban/Rural [dropdown]
Project Description* test	E & C Percent [dropdown]
Spec Book* 19 - Spec Year 2019	Design Program [dropdown]
Unit System* English	Designer [dropdown]
Federal/State/OTA Project Number [dropdown]	Revised By [dropdown]
Controlling Project [checkbox]	Priced By [dropdown]
Project Type [dropdown]	Priced Date mm/dd/yyyy
Project Status [dropdown]	Vendor Access [dropdown]
Project Work Type [dropdown]	Sub-Vendor Access 1 [dropdown]
Submittal Date mm/dd/yyyy	Sub-Vendor Access 2 [dropdown]

### (Counties Tab)

**Step 1:** Still on the **General Tab**, click the **Counties Tab** on the left side panel.

#### Project Summary

▼ Project: 123456789 - test	
Proposal:	
<a href="#">General</a>	Project J/I 12345678
<a href="#">Counties</a>	Project D test
<a href="#">Districts</a>	Spec Boo 19 - Spec
<a href="#">Points</a>	Unit Syste English
<a href="#">Road Segments</a>	
<a href="#">Bridge Segments</a>	
<a href="#">Workflow</a>	
<a href="#">Agency Views</a>	

**Step 2:** Now on the **Counties Tab**, click the **New** button.

### Project Summary

▼ Project: 123456789 - test

Proposal:

General

Counties

Districts

Points

Road Segments

Bridge Segments

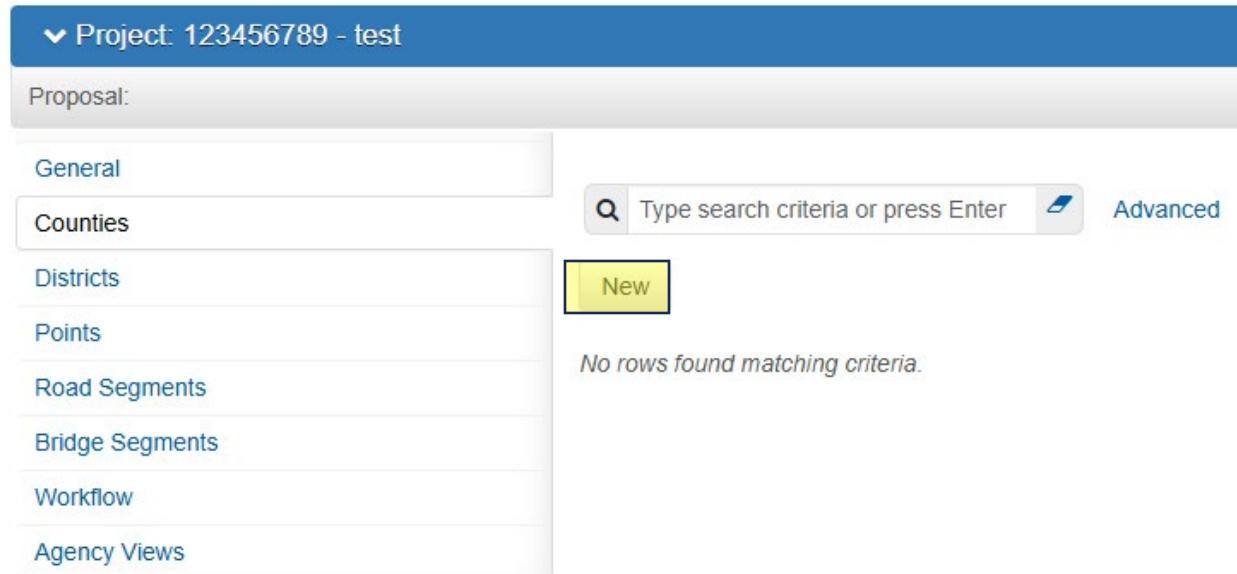
Workflow

Agency Views

Type search criteria or press Enter

Advanced

No rows found matching criteria.



**Step 3:** In the **County ID Field** enter the needed county and press the **Enter key**.

Type search criteria or press Enter

Advanced

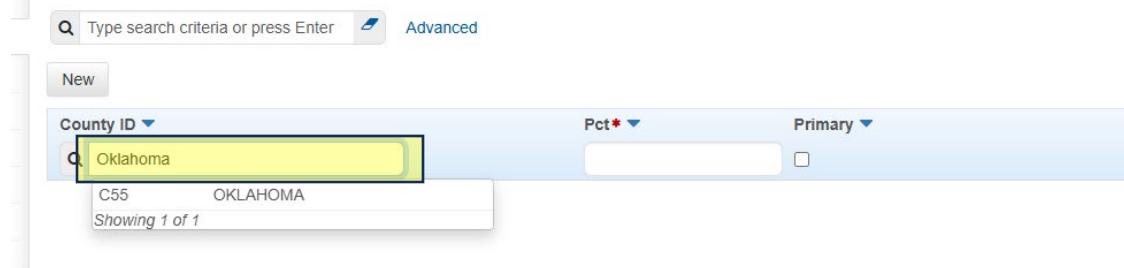
New

County ID ▼

Oklahoma

C55 OKLAHOMA

Showing 1 of 1



**Step 4:** When the needed county appears, click the County from the drop-down.

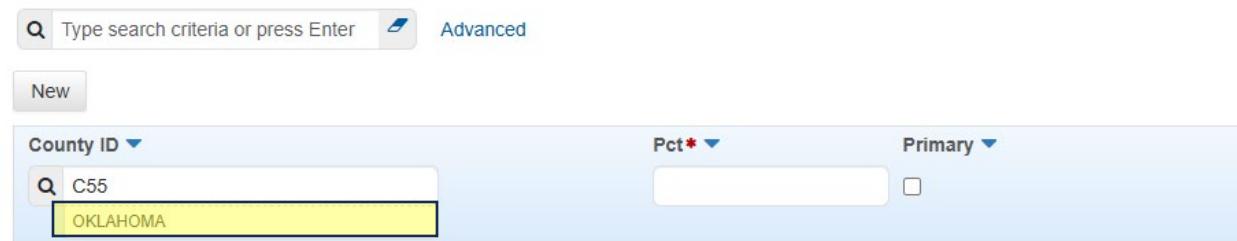
Type search criteria or press Enter

Advanced

New

County ID ▼

C55 OKLAHOMA



**Step 5:** In the **Pct (Percent) field**, enter the percentage of the project that falls in the county.

New

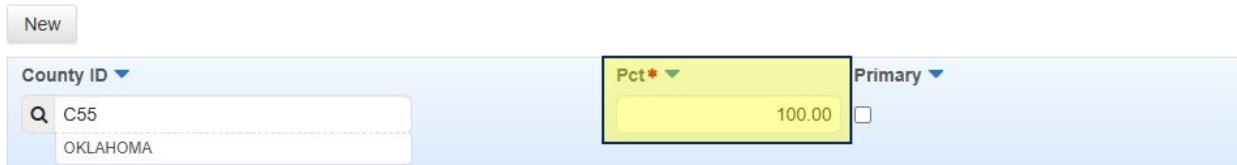
County ID ▼

C55 OKLAHOMA

Pct\* ▼

100.00

Primary ▼



**Step 6:** Click the **Primary** checkbox.



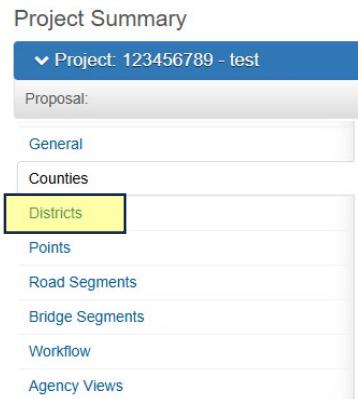
A screenshot of a data entry interface. At the top left is a 'New' button. Below it is a table row with three columns. The first column is 'County ID' with a dropdown arrow and a search bar containing 'C55' and 'OKLAHOMA'. The second column is 'Pct\*' with a dropdown arrow and a text input field showing '100.00'. The third column is 'Primary' with a dropdown arrow and a checked checkbox. The entire row is highlighted with a light blue background.

**Step 7:** Click the **Save** button.

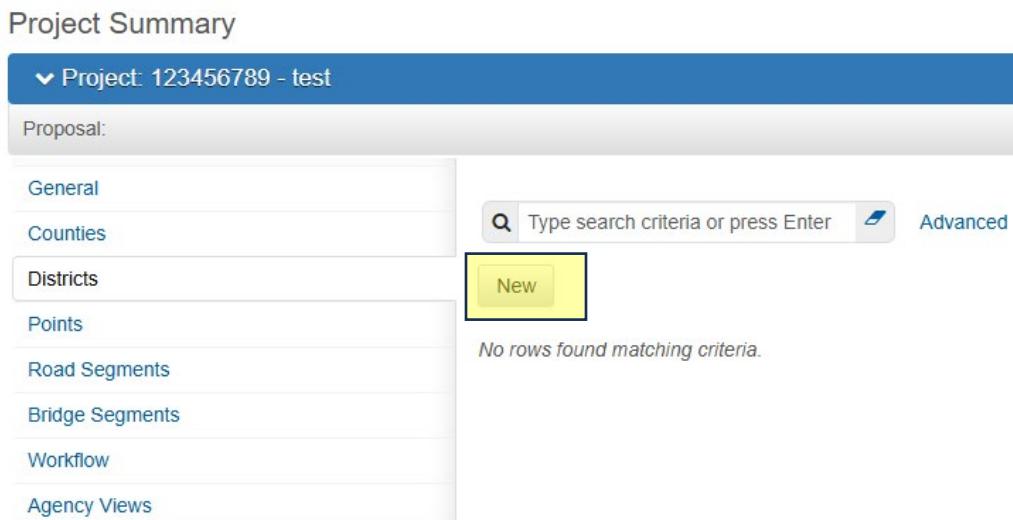


## (Districts Tab)

**Step 8:** Click the **Districts Tab** on the left side panel.



**Step 9:** On the **Districts Tab**, select the **New** button.



A screenshot of the 'Districts' tab in the 'Project Summary' sidebar. The 'Districts' tab is highlighted with a yellow box. On the right, there is a search bar with 'Type search criteria or press Enter' and an 'Advanced' link. Below the search bar is a 'New' button, which is also highlighted with a yellow box. The main area displays the message 'No rows found matching criteria.'

**Step 10:** In the **District ID field**, enter the needed **District** and hit the Enter key.

New

District ID ▼

Begin typing to search or press Enter

01000	DISTRICT 1
02000	DISTRICT 2
03000	DISTRICT 3
04000	DISTRICT 4
05000	DISTRICT 5
06000	DISTRICT 6
07000	DISTRICT 7
08000	DISTRICT 8

Showing 8 of 8

Supplemental Description ▼

**Step 11:** From the drop-down select the desired District.

New

District ID ▼

04000 DISTRICT 4

Supplemental Description ▼

Primary ▼

**Step 12:** Select the **Primary** checkbox.

New

District ID ▼

04000 DISTRICT 4

Supplemental Description ▼

Primary ▼

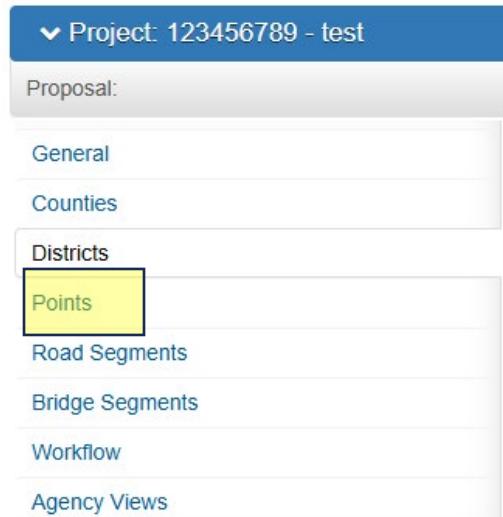
**Step 13:** Click the **Save** button.

Save ▾ ?

## (Points Tab)

**Step 14:** Select the **Points Tab** on the left side panel.

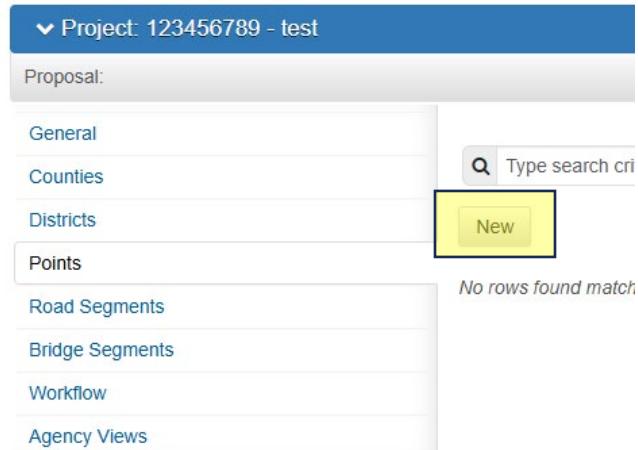
Project Summary



The screenshot shows a sidebar with a list of categories. At the top is a blue header bar with a dropdown arrow and the text 'Project: 123456789 - test'. Below this is a 'Proposal:' section. The sidebar categories are: General, Counties, Districts, Points (which is highlighted with a yellow box), Road Segments, Bridge Segments, Workflow, and Agency Views.

**Step 15:** Click the **New** button.

Project Summary



The screenshot shows the same Project Summary interface as the previous step, but with a 'New' button highlighted with a yellow box. The 'New' button is located in the 'Districts' section of the sidebar. The sidebar also includes a search bar with the placeholder 'Type search cri'.

**Step 16:** Enter the **Latitude** and **Longitude** in their individual fields.

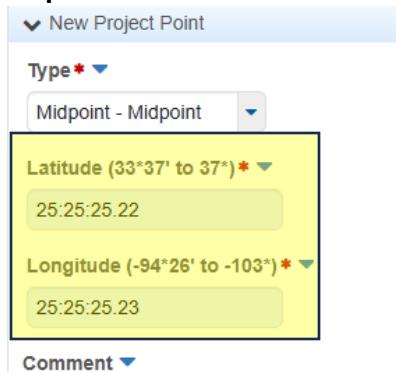
New Project Point

Type \* ▾  
Midpoint - Midpoint ▾

Latitude (33°37' to 37°)\* ▾  
25:25:25.22

Longitude (-94°26' to -103°)\* ▾  
25:25:25.23

Comment ▾



**Step 17:** In the **Description Field**, enter the desired **Description**.

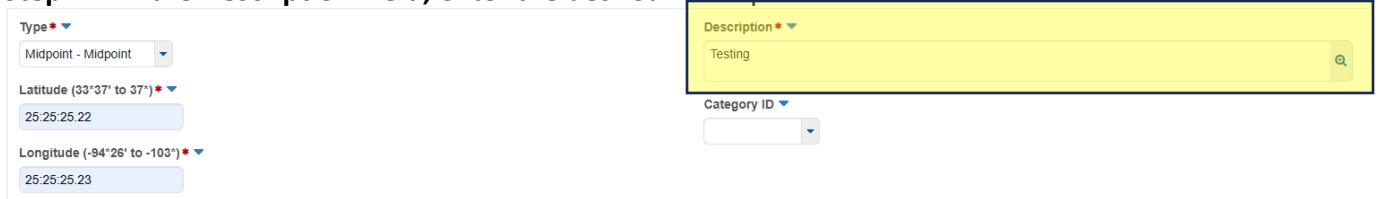
Type \* ▾  
Midpoint - Midpoint ▾

Latitude (33°37' to 37°)\* ▾  
25:25:25.22

Longitude (-94°26' to -103°)\* ▾  
25:25:25.23

Description \* ▾  
Testing

Category ID ▾



**Step 18:** Click the **Save** button.



## (Road Segments Tab)

**Step 19:** Click the **Road Segments Tab** on the left side panel.

### Project Summary

Project: 123456789 - test

Proposal:

General

Counties

Districts

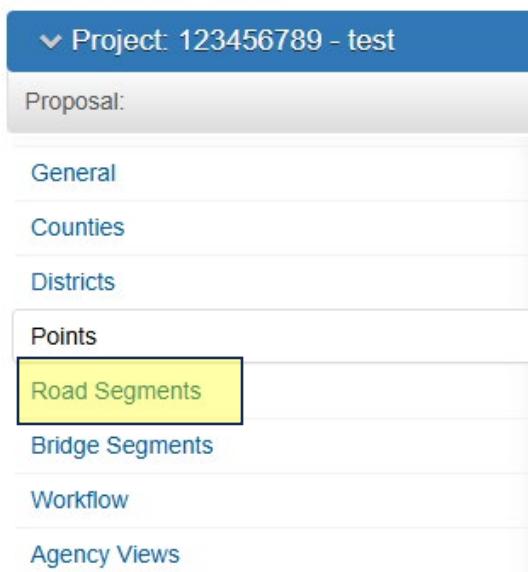
Points

Road Segments

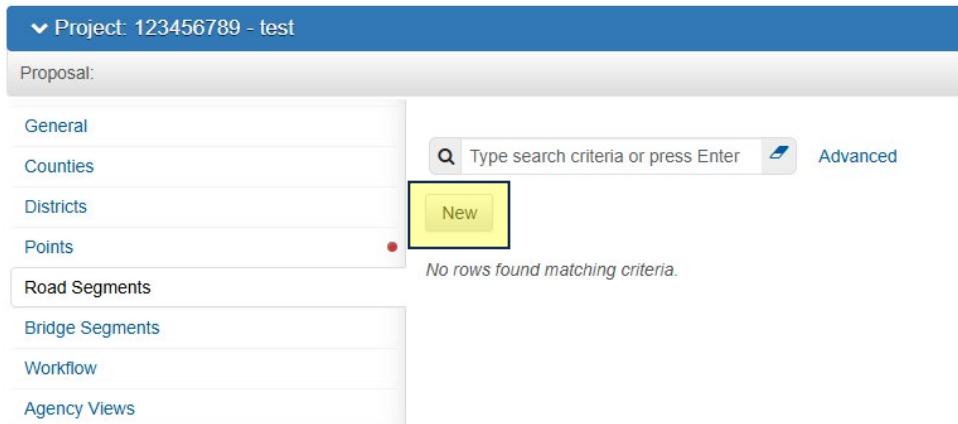
Bridge Segments

Workflow

Agency Views

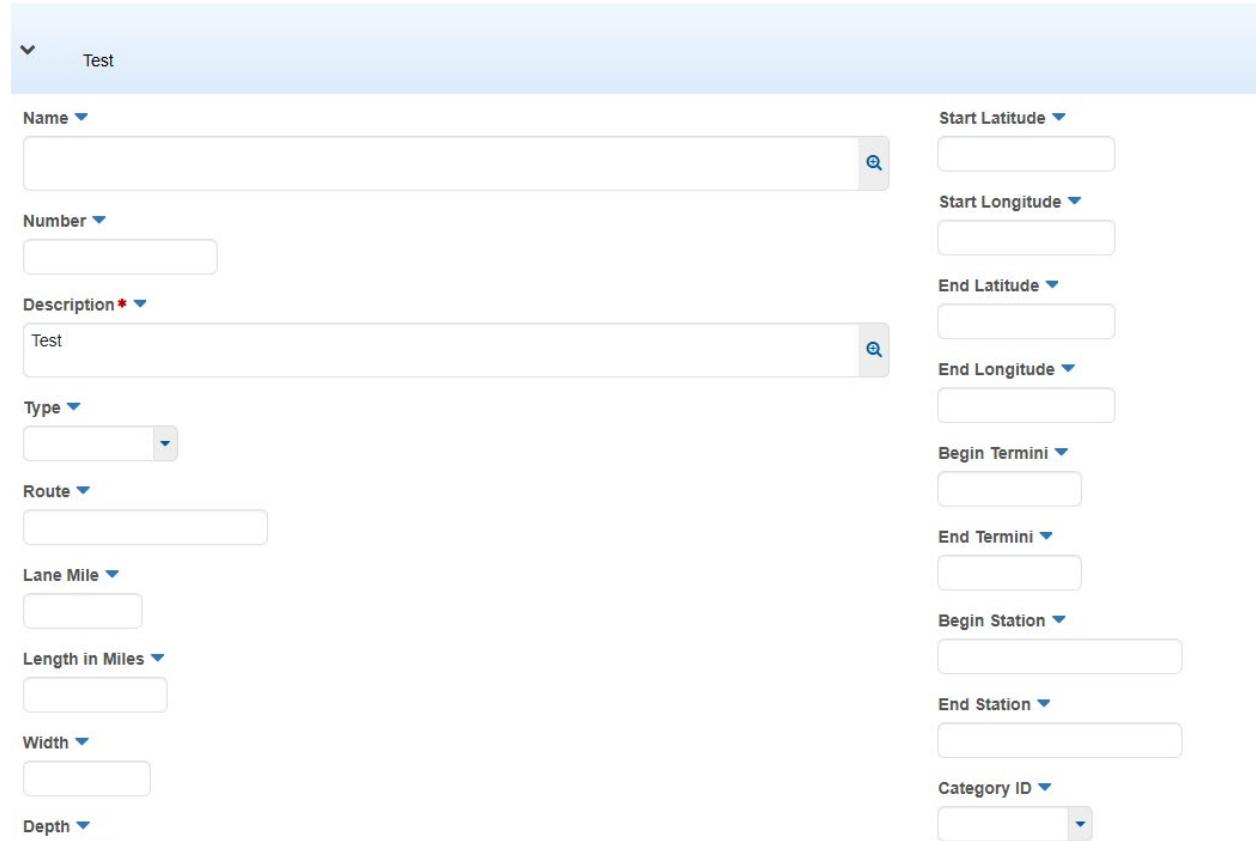


**Step 20:** Now on the **Road Segments Tab** select the **New** button.



A screenshot of a software interface titled "Project 123456789 - test". The "Road Segments" tab is selected. In the center, there is a search bar with the placeholder "Type search criteria or press Enter" and a magnifying glass icon. To the right of the search bar is an "Advanced" link. Below the search bar is a yellow rectangular button with the word "New" in black text. The text "No rows found matching criteria." is displayed below the search bar. On the left side, there is a vertical list of categories: General, Counties, Districts, Points, Road Segments (which is selected and highlighted in blue), Bridge Segments, Workflow, and Agency Views.

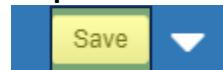
**Step 21:** Enter all the **System Required Fields** (Red Asterik **\***) and any other needed information.



A screenshot of a "Test" project page showing the "Road Segments" form. The form contains the following fields:

- Name:** Test (highlighted with a yellow box)
- Number:** (empty input field)
- Description:** Test (highlighted with a yellow box)
- Type:** (dropdown menu)
- Route:** (empty input field)
- Lane Mile:** (empty input field)
- Length in Miles:** (empty input field)
- Width:** (empty input field)
- Depth:** (empty input field)
- Start Latitude:** (empty input field)
- Start Longitude:** (empty input field)
- End Latitude:** (empty input field)
- End Longitude:** (empty input field)
- Begin Termini:** (empty input field)
- End Termini:** (empty input field)
- Begin Station:** (empty input field)
- End Station:** (empty input field)
- Category ID:** (dropdown menu)

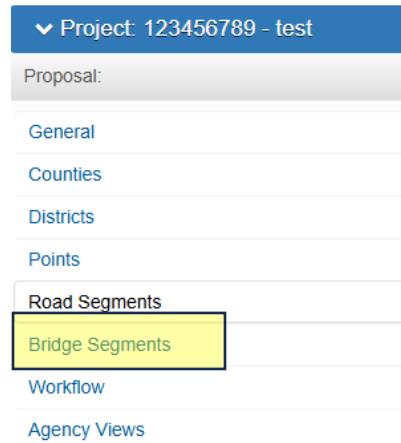
**Step 22:** Click the **Save** button.



## (Bridge Segments Tab)

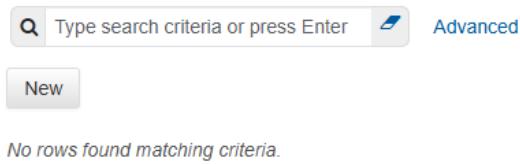
**Step 23:** Click the **Bridge Segments Tab** on the left side panel.

Project Summary



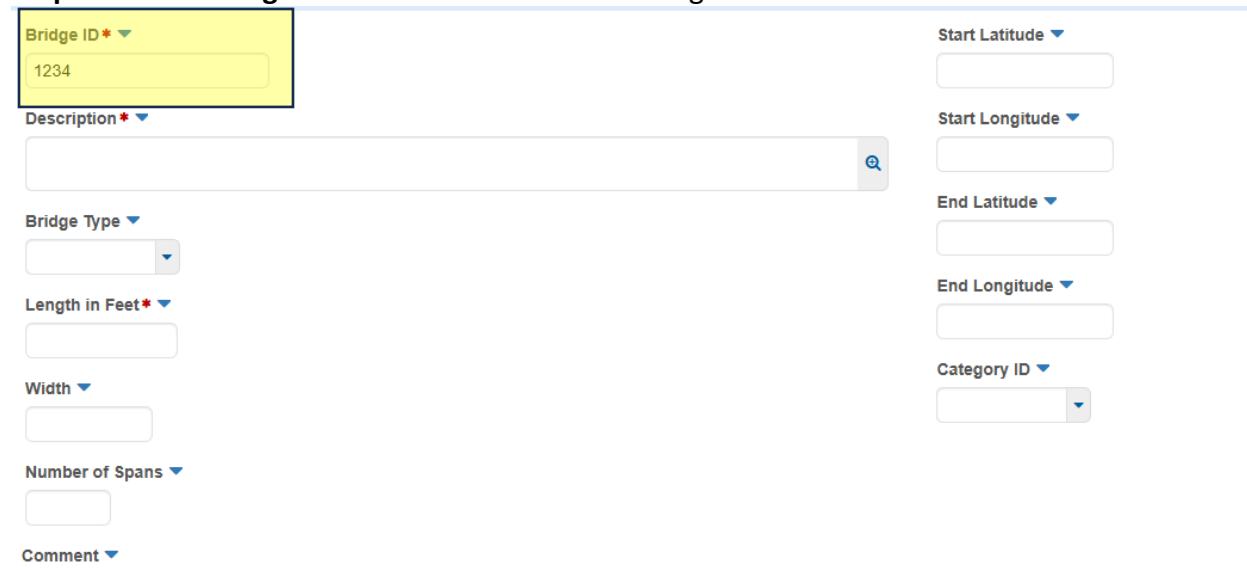
The screenshot shows a sidebar with a blue header bar containing a dropdown menu labeled "Project: 123456789 - test". Below the header, there is a "Proposal:" section. The sidebar contains several links: "General", "Counties", "Districts", "Points", "Road Segments" (which is the current active tab, indicated by a yellow box), and "Bridge Segments" (which is also highlighted with a yellow box). Further down the list are "Workflow" and "Agency Views".

**Step 24:** On the **Bridge Segments Tab** select the **New** button.



The screenshot shows the "Bridge Segments" tab selected. At the top, there is a search bar with a magnifying glass icon and the placeholder text "Type search criteria or press Enter". To the right of the search bar is an "Advanced" link. Below the search bar is a "New" button. A message "No rows found matching criteria." is displayed below the button.

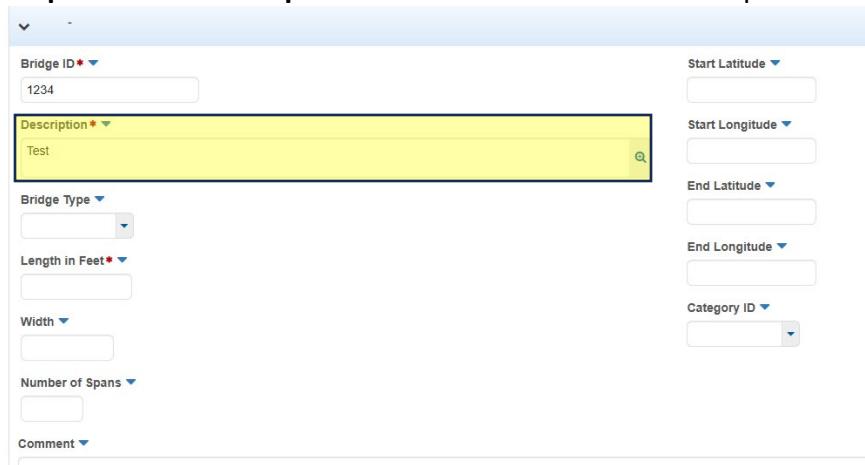
**Step 25:** In the **Bridge ID** field enter the needed Bridge ID.



The screenshot shows the "New" form for a bridge segment. The "Bridge ID" field is highlighted with a yellow box and contains the value "1234". Other fields include "Description", "Bridge Type", "Length in Feet", "Width", "Number of Spans", "Start Latitude", "Start Longitude", "End Latitude", "End Longitude", and "Category ID". Each field has a dropdown arrow to its right.

Bridge ID *	1234	Start Latitude
Description *		Start Longitude
Bridge Type		End Latitude
Length in Feet *		End Longitude
Width		Category ID
Number of Spans		
Comment		

**Step 26:** In the **Description Field** enter the needed description.



The form includes fields for Bridge ID (1234), Description (Test), Start Latitude, Start Longitude, End Latitude, End Longitude, Category ID, Bridge Type, Length in Feet, Width, Number of Spans, and Comment.

**Step 27:** Enter any other needed/desired information the other fields. If no other information is needed, click the **Save** button.

