



## 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

Counties

Districts

Points

Road Segments

Bridge Segments

Workflow

Agency Views

Project J/P Number

123456789

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**  
[Agency Views](#)

Workflow

Default - do not use

ODOT Workflow

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

Project Summary

▼ Project: 123456789 - test

Proposal:

[General](#)  
[Counties](#)  
[Districts](#)  
[Points](#)  
[Road Segments](#)  
[Bridge Segments](#)  
**Workflow**  
[Agency Views](#)

Workflow

ODOT Workflow ▼

WorkflowPhase

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

The screenshot shows a web application interface. At the top, a blue header bar contains a dropdown menu labeled 'Project: 123456789 - test'. Below this is a light gray bar labeled 'Proposal:'. On the left side, there is a vertical list of menu items: 'General', 'Counties', 'Districts', 'Points', 'Road Segments', 'Bridge Segments', 'Workflow', and 'Agency Views'. The 'Workflow' item is currently selected. To the right of this list, there are two dropdown menus. The first is labeled 'Workflow' and has 'ODOT Workflow' selected. The second is labeled 'WorkflowPhase' and is open, showing a list of options. The option 'QAQC / Design' is highlighted in yellow. Other options in the list include 'Consultant Upload, XML upload / Built the Project / Estimation', 'OE 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.

The screenshot shows a close-up of the bottom right corner of the interface. It features a blue header bar with a yellow 'Save' button. To the right of the 'Save' button is a small dropdown arrow and a question mark icon.

## 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)

The screenshot displays a web form for entering project information. The form is organized into two main columns. The left column contains fields for Project J/P Number (123456789), Project Description (test), Spec Book (19 - Spec Year 2019), Unit System (English), Federal/State/OTA Project Number, Controlling Project (checkbox), Project Type, Project Status, Project Work Type, and Submittal Date. The right column contains fields for Urban/Rural, E & C Percent, Design Program, Designer, Revised By, Priced By, Priced Date, Vendor Access, Sub-Vendor Access 1, and Sub-Vendor Access 2. Each field is either a text input, a dropdown menu, or a search field with a magnifying glass icon.

### (Counties Tab)

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

#### Project Summary

The screenshot shows the Project Summary panel. At the top, there is a blue header bar with the text "Project: 123456789 - test". Below this is a grey bar with the text "Proposal:". The main area of the panel is a list of tabs: General, Counties, Districts, Points, Road Segments, Bridge Segments, Workflow, and Agency Views. The "Counties" tab is highlighted with a yellow background. To the right of the tabs, there is a preview of the project information for the selected tab, showing fields for Project J/P Number (12345678), Project Description (test), Spec Book (19 - Spec Year 2019), and Unit System (English).

**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

Q

Type search criteria or press Enter

Advanced

New

No rows found matching criteria.

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

Q

Type search criteria or press Enter

Advanced

New

County ID ▼

Q

Oklahoma

C55OKLAHOMA

Showing 1 of 1

Pct\* ▼

Primary ▼

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

Q

Type search criteria or press Enter

Advanced

New

County ID ▼

Q

C55

OKLAHOMA

Pct\* ▼

Primary ▼

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

New

County ID ▼

Q

C55

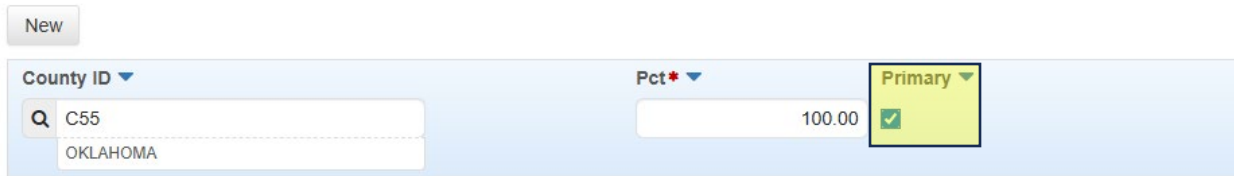
OKLAHOMA

Pct\* ▼

100.00

Primary ▼

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



The screenshot shows a form with a 'New' button at the top left. Below it, there is a 'County ID' dropdown menu with a search bar containing 'C55' and a list item 'OKLAHOMA'. To the right of the search bar is a 'Pct' field with a red star icon and a dropdown arrow, showing the value '100.00'. Further right is a 'Primary' checkbox, which is checked and highlighted with a yellow box.

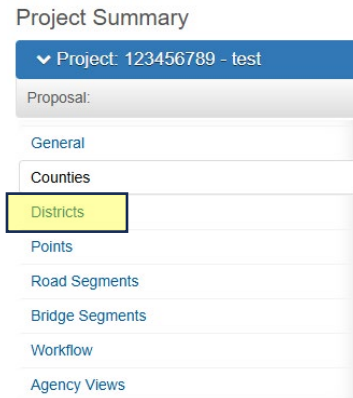
**Step 7:** Click the **Save** button.



The screenshot shows a blue button labeled 'Save' with a dropdown arrow and a question mark icon.

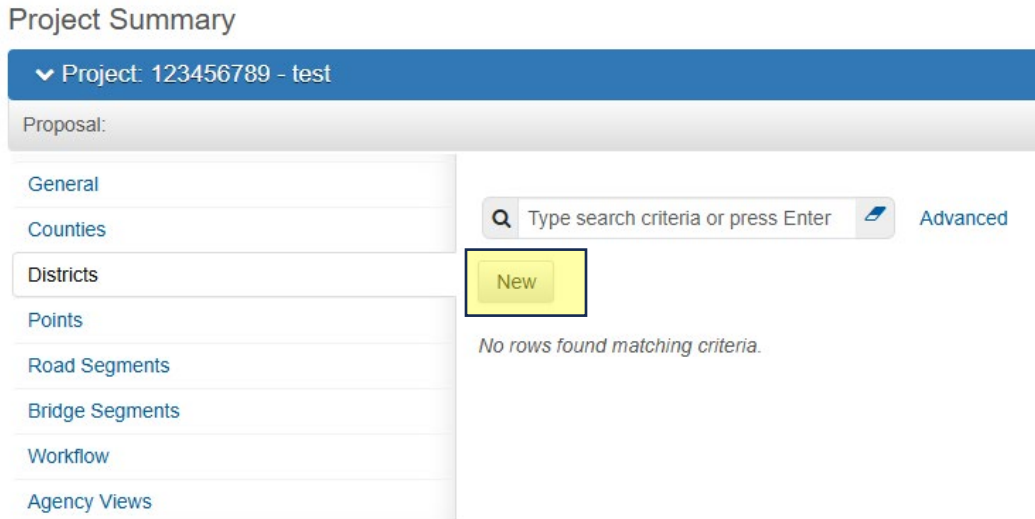
## (Districts Tab)

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



The screenshot shows the left side panel of the application. It has a 'Project Summary' header and a dropdown menu showing 'Project: 123456789 - test'. Below this is a 'Proposal:' section. The left side panel has a list of tabs: 'General', 'Counties', 'Districts', 'Points', 'Road Segments', 'Bridge Segments', 'Workflow', and 'Agency Views'. The 'Districts' tab is highlighted with a yellow box.

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



The screenshot shows the 'Districts Tab' selected in the left side panel. The main content area has a 'Project Summary' header and a dropdown menu showing 'Project: 123456789 - test'. Below this is a 'Proposal:' section. The left side panel has a list of tabs: 'General', 'Counties', 'Districts', 'Points', 'Road Segments', 'Bridge Segments', 'Workflow', and 'Agency Views'. The 'Districts' tab is highlighted with a yellow box. In the main content area, there is a search bar with the text 'Type search criteria or press Enter' and a 'New' button highlighted with a yellow box. Below the search bar, there is a message that says '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

▼ Project: 123456789 - test

Proposal:

General

Counties

Districts

**Points**

Road Segments

Bridge Segments

Workflow

Agency Views

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

### Project Summary

▼ Project: 123456789 - test

Proposal:

General

Counties

Districts

**Points**

Road Segments

Bridge Segments

Workflow

Agency Views

🔍 Type search cri

**New**

No rows found match

**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.

Save ▼ ?

## (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.

Project: 123456789 - test

Proposal:

- General
- Counties
- Districts
- Points
- Road Segments**
- Bridge Segments
- Workflow
- Agency Views

Q Type search criteria or press Enter Advanced

New

No rows found matching criteria.

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

Test

Name

Number

Description \*

Type

Route

Lane Mile

Length in Miles

Width

Depth

Start Latitude

Start Longitude

End Latitude

End Longitude

Begin Termini

End Termini

Begin Station

End Station

Category ID

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

Save

## (Bridge Segments Tab)

**Step 23:** Click the **Bridge 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 24:** On the **Bridge Segments Tab** select the **New** button.

Q Type search criteria or press Enter

Advanced

New

No rows found matching criteria.

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

Bridge ID \* ▼

1234

Description \* ▼

Bridge Type ▼

Length in Feet \* ▼

Width ▼

Number of Spans ▼

Comment ▼

Start Latitude ▼

Start Longitude ▼

End Latitude ▼

End Longitude ▼

Category ID ▼

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

Bridge ID ▼ 1234

Description ▼ Test

Bridge Type ▼

Length in Feet ▼

Width ▼

Number of Spans ▼

Comment ▼

Start Latitude ▼

Start Longitude ▼

End Latitude ▼

End Longitude ▼

Category ID ▼

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

