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User's Guide

(Welcome, Getting Started, Reports and Appendix A
Chapters Extracted from User's Guide)

Trns•port CRLMS[®]
Non-Agency Users

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1 Welcome

1.1 Introduction

This user's guide provides detailed information about using web Trns•port CRLMS® as a non-agency user, along with general information about the web Trns•port system.

This guide is divided into chapters. Each chapter consists of multiple topics that explain how to use different software features related to the current task and subject matter.

For additional information about using the features described in this guide, refer to the Online Help system.

1.1.1 Document Conventions

This guide uses different techniques to help identify important information:

- Tab names, button names, menu names, and menu choices are shown in **bold text**.
- Important terms are shown in *italics*.



Note: Important notes are indented and flagged with small note icons. Notes contain extra information that can help you work more efficiently or help you better understand a process.



Caution: Cautions appear similar to notes, but are flagged with an exclamation point icon. Read all cautions. They contain important information that should not be overlooked.

1.1.2 Navigation

This user's guide can be printed, allowing readers to navigate the document by using the table of contents, chapter numbers, and page numbers. Viewing this user's guide in pdf format provides additional opportunities for navigation.



Note: Adobe Reader must be installed on your workstation in order to view this document as a pdf file. You can download the latest version of Adobe Reader from the Adobe website: <http://www.adobe.com/>

When you view the user's guide as a pdf file, you can use the Bookmarks panel on the left side of the Adobe Reader window to navigate within the document. The Bookmarks panel contains an outline of the section headings used in the document, similar to a table of contents. Bookmarks function like hyperlinks. You can click a bookmark to display the related page in the right pane of the Reader window.

The pdf version of the user's guide also contains hyperlinks throughout the text. You can click a hyperlink to view a different page that describes related features or tasks. Entries in the table of contents are also linked to the related pages in the document.

Finally, viewing the user's guide as a pdf file enables you to use the search features in Adobe Reader. To display the search field, click the **Edit** menu and click **Find**, or you can press CTRL+F. Type a word or phrase in the search field, and press Enter. Adobe Reader displays the first instance of the word or phrase you entered. You can click the **Next** and **Previous** buttons to view each additional instance.

1.2 Using Online Help

The AASHTO Trns•port® Help system provides a wealth of information immediately available to you while you work. Understanding how the Help system works makes it easier to find the information you need.

The help system is *context sensitive*, which means that when you click the **Help** button  on a component in the software, the system provides information about the functionality of that component only. Each Help page provides links to other help pages containing related information.

The help system also contains topics that are more general in nature and not linked to a specific component in the software. You can navigate the entire Help system by clicking the **Contents** link in the top left corner of any Help page, or by clicking the **Help** button on the Menu Bar.

1.2.1 Contents

The Contents pane is organized by business category and uses expandable and collapsible books and pages to display the list of topics available in the help system. This pane helps you navigate through the hierarchy of topics to find a desired category and subject.

Click a book to expand it, and then click the page you want to see. The system displays the page in the right pane of the browser window.

1.2.2 Search

The Search pane provides a rapid full-text search of all the topics in the help system. To display the Search pane from any help page, click the **Search** button in the top left corner next to the **Contents** button. To perform a search, type your search criteria in the **Search** input field on the toolbar, and click the **Go** button. To search for a phrase, enclose the phrase in quotes in the Search field.

The system performs the search and automatically opens the Search pane, which displays a list of the topics in which the search text appears. Topics are ranked in order of best match. Click on a topic to display the page in the right pane of the browser window.

You can also perform a search in the Search pane itself by clicking on the **Search** tab.

To make your first experiences with the Trns•port software easier and more intuitive, you may also want to review the [Getting Started](#) section of the Help.

2 CRLMS for Non-Agency Users

This section provides instructions for using the non-agency business areas of the Civil Rights and Labor Management System (CRLMS). Non-agency users must access CRLMS in order to manage DBE commitments, payrolls, subcontractor payments, bidder/quoter information, and DBE reporting associated with agency contracts.

The CRLMS Non-Agency component is the gateway to other components in the application that you will use to manage these areas of responsibility. To access CRLMS components, log on to the system and click the blue link for the area you want to access. Alternatively, select **View** from the **Actions** menu to the right of that link.

The following sections provide information about managing specific areas of CRLMS:

- [Contracts](#)
- [Payrolls](#)
- [Unapproved Payrolls](#)
- [Bidder Quoter](#)
- [Proposal Vendor DBE Commitment](#)
- [Contract Current DBE Commitment](#)
- [Contract Approved DBE Commitment](#)

3 Getting Started

3.1 Overview of Getting Started

The *Getting Started* section describes how to use features in the web Trns•port software to complete basic tasks. Carefully review these topics to make your first experiences with the software easier and more intuitive.

Getting Started includes these topics:

- [Setting up Your Browser](#)
- [Logging On](#)
- [Navigating in Trns•port](#)
- [Logging Off](#)
- [Understanding Your Role](#)
- [Viewing Recent Activity](#)
- [Viewing My Pages](#)
- [Using Trns•port Components](#)
- [Working with Fields](#)
- [Working with Lists](#)
- [Sorting and Filtering Lists](#)
- [Using Operators with the Advanced Filter](#)
- [Using Actions Menus](#)
- [Selecting Data in Modal Windows](#)

Finally, be sure to check the [FAQ](#) page, which presents answers to the questions most frequently asked about working with web Trns•port.

3.2 Setting Up Your Browser

Because the Trns•port software is a web application, correct web browser settings are an important part of making sure the application performs as it should. The information in this topic will help you to set your browser options correctly.

3.2.1 Using the Correct Browser

The Trns•port software is designed to run on the Internet Explorer browser, Version 8 or 9 (IE8 or IE9). Make sure you update your browser to one of these versions.

3.2.2 Setting the Browser Mode

The browser mode should be set to its native mode at all times, not to a previous version view or a compatibility view. When you initially log on to the web Trns•port software, the browser mode is automatically set to **Compatibility View**.

Follow these steps to change this default setting:

1. Open the Internet Explorer browser.
2. If you are using IE9, press the **Alt** button to display the toolbar.
3. From the **Tools** menu, select **Compatibility View Settings**.

The browser opens a Compatibility View Settings dialog window.

4. In the Compatibility View Settings window, clear the **Display intranet sites in Compatibility View** check box.
5. Click **Close**.

3.2.3 Setting Internet Options

For components to be displayed properly, the browser must be set to refresh previously viewed pages, and the browser security must enable DOM storage. Follow these steps to verify these settings:

1. Open the Internet Explorer browser.
2. From the **Tools** menu, select **Internet Options**.

The browser displays the Internet Options dialog box.

3. Under Browsing History, click the **Settings** button.

The browser displays the Temporary Internet Files and History Settings dialog box.

4. For the *Check for newer versions of stored pages* setting, click the **Every time I visit the webpage** option.
5. Click **OK**.
6. In the Internet Options dialog box, click the **Advanced** tab.
7. In the **Settings** box, scroll down to the **Security** section, and ensure the **Enable DOM Storage** option is selected.
8. Click **OK**.

3.3 Logging On

Trns•port is a web-based application. You start web Trns•port by opening a web browser (Internet Explorer) and entering the address of the program.



The screenshot shows the login page for Trns•port. On the left is the logo for AASHTO Trns•port, described as a 'Transportation Software Management Solution'. The logo consists of a stylized orange and blue circular graphic above the text 'AASHTO Trns•port'. To the right of the logo is a login form with three input fields: 'Username:', 'Password:', and 'Domain:'. The 'Domain:' field is a dropdown menu currently showing 'WTADDomain'. Below the input fields is a 'Log on' button.

Figure 3-1. Logon Page

On the logon page, enter your user name and password. The **Username** field is not case sensitive. The **Password** field is case sensitive.

3.4 Navigating in Trns•port

Trns•port webpages include a variety of features to help you navigate more easily through the system. The features described in this section are standard throughout the system.



Note: To protect the information contained in your agency's system, Trns•port navigation features will only provide access to those components for which your active role has been assigned access rights. For more information, see [Understanding Your Role](#) and [Using Trns•port Components](#).

3.4.1 The Trns•port Dashboard

When you log on to the Trns•port system, the software opens on the Trns•port dashboard. You can also go to the dashboard at any time by clicking the **Home** button on the [Menu Bar](#).

The dashboard contains one or more components. Each component is identified by a title set within a blue header bar. Each Trns•port component provides access to the information and processes required for a specific area of your agency's work. The components you see on your dashboard are those that match the specific areas of responsibility assigned to your active role. See [Understanding Your Role](#) and [Using Trns•port Components](#) for more information.

The following example shows the dashboard as it might appear for a system administrator. Keep in mind that some of the components shown in the example might not be available for you depending on your active role and which business areas are included on your system.

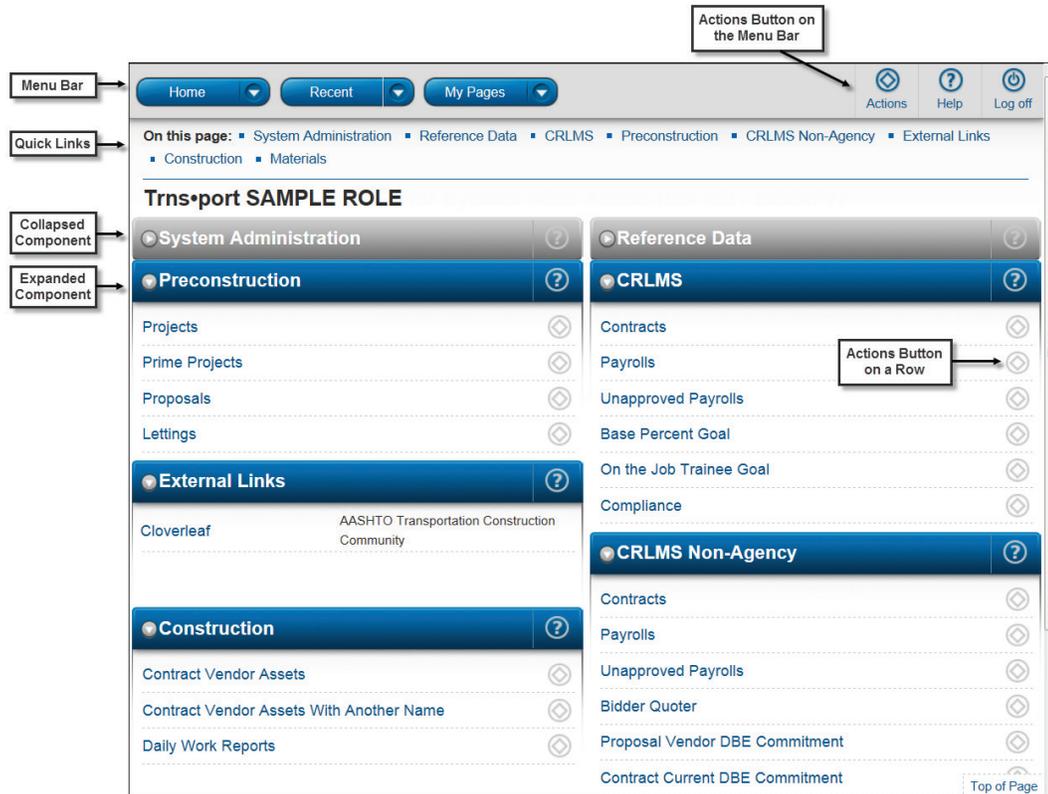


Figure 3-2. Sample Dashboard

The Trns•port dashboard includes these standard features:

- **Menu Bar** — The system displays the Menu Bar at the top of every webpage in the system. The buttons and menus on this bar help you to move quickly through the system to visit the pages and components you use most often.

Your agency may choose to also display these features on your dashboard:

- **Home Page News** — This component provides important information from your agency.
- **External Links** — This component provides links to websites you use outside of the web Trns•port application.

3.4.2 Menu Bar

The Menu Bar is a horizontal strip at the top of every Trns•port webpage.



Figure 3-3. Menu Bar

The left side of the Menu Bar contains these buttons and menus:

- **Home** - This button is a link to the Trns•port dashboard for your active role. Clicking the down arrow opens the Home menu, which contains an indicator for your active role (bold text with a green check mark) and lists all the roles assigned to you. This menu allows you to change roles from any location in the system. For more information about roles, see [Understanding Your Role](#).
- **Recent** - This button is a link to the [Recent Activity Overview](#) component, where you can manage a list of the most recent pages you have visited in your active role. Clicking the down arrow also displays the list, sorted by most to least recently visited. If you click on a page in the list, the system takes you to that location.
- **My Pages** - This button is a link to the [My Page Overview](#) component, where you can manage frequently used (or *favorite*) pages for your active role. You can add pages as a favorites from any location in the system by clicking the down arrow and selecting **Remember this Page**.

The right side of the Menu Bar contains these buttons and menus:

- **Actions** - Clicking this button opens a menu of actions you can take within the system. The actions that are listed are limited to those that are relevant for your active role. When you select an action, the system automatically takes you to the component in the system where the action can be performed.
- **Help** - If your agency has recorded agency Help, clicking this button takes you to a separate browser window containing online help for your active role. If agency Help has not been recorded, clicking this button takes you to the Welcome page of the standard online Help.
- **Log off** - Clicking this button ends your Trns•port session (see [Logging Off](#)).

3.4.3 Quick Links

Quick links are located below the Menu Bar and above the webpage title and displayed in blue text. These links allow you to quickly jump to application pages related to the current page.

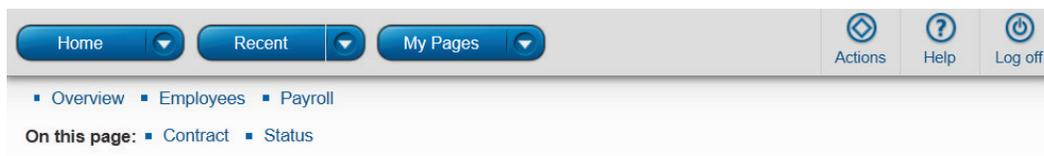


Figure 3-4. Quick Links Below the Menu Bar

If you are on a page that contains multiple components, quick links preceded by the label **On this page** are displayed for each component on the page. When you click one of these quick links, the system automatically scrolls the page to the location of the component.

3.4.4 Hypertext Links

Hypertext links can be located anywhere on an application component or webpage and are identified by blue underlined text. When clicked, a link takes you to another component or page, usually one containing more detailed information than what is available in the current location. After you have clicked a link, it changes from blue to purple to remind you that you have already visited that link.

3.4.5 Icons

Icons are small images throughout the system that either convey information or can be clicked to perform an action. For example, a red asterisk icon indicates a required field. A broom icon in a Quick Find search box can be clicked to reset search criteria. This table shows some of the common icons used in the system:

Icon	Usage
	The broom icon appears in Quick Find search boxes after criteria is entered. You can click the icon to reset the search criteria
	This magnifying glass icon at the left side of a field indicates an auto-complete field. Auto-complete fields display a filtered list of field values based on the first few characters you type. You can press Enter to show all values.
	This magnifying glass is sometimes displayed on the right side of a text box. Clicking this button opens a text dialog panel that allows you to view and edit the text in a larger area.
	A red asterisk indicates a field where data entry is required.
	The actions icon appears on Actions buttons that you can click to display an Actions menu. Actions menus provide access to commands and functions you can perform on data.
	The undo icon appears on Undo buttons that you can click to reverse a delete action.
	The help icon appears on Help buttons that you can click to display the help system.
	The calendar icon is displayed on the right side of a date field. You can click the calendar icon to display a calendar where you can pick a date as the field value.

Table 3-1. System Icons

3.4.6 Alternate Paths

Keep in mind that all of the various navigational elements, such as hypertext links, quick links, recent pages, and **Actions** menus, can all provide different ways of accomplishing the same task. The same command might be accessible from an **Actions** menu or as a link. For example, to access the Project Overview component, you can click the **Projects** link on the Preconstruction component, or you can select **Open** from the **Actions** menu on the Projects row. Both methods of navigation achieve the same result. Feel free to explore the system and find the ways of navigation that are best for you.

3.4.7 Using Bookmarks to Navigate in Trns•port

You can bookmark specific pages in the software just as you would for any other Web site. However, if you have not yet logged on to the system, clicking a bookmark will take you to the logon page rather than the bookmarked page.

 **Note:** For questions about using your browser's navigation features, such as the **Back** button, and the Tab and Arrow keys on your keyboard, see the [FAQ page](#).

3.5 Logging Off

You can log off the system at any time by clicking the **Log off** button  on the Menu Bar on any page in the application. When you log off, the software ends your session and takes you to the web Trns•port logon page.

3.6 Understanding Your Role

A user *role* is a name associated with a collection of security access rights to the information contained in Trns•port components. Roles combine the permissions needed for several related tasks and allow you more efficient access to the parts of the system you need. Roles are designed by your agency and assigned to you by your system administrator.

All users of the Trns•port system are assigned at least one security role. Many users have multiple roles, but you can only use one role at a time. Therefore, you are always limited to the security access rights of your *Active Role*.

To see which of your roles is currently active, click the down arrow on the **Home** button on the Menu Bar. The **Home** menu lists all of the roles to which you are currently assigned in blue. Your active or current role appears at the top of the list in black with a green check mark beside it.

You can change your active role at any time by clicking on another role on the **Home** menu. By selecting a different role, your permissions and security access are changed to reflect the areas you need to access to perform your duties in the new role.

3.7 Viewing Recent Activity

The Recent Activity Overview component contains a list of the most recent pages and components you have visited in your currently active role. To display the Recent Activity Overview, click the **Recent** button on the Menu Bar.

Each row contains the date and time of the last visit and an **Actions** button. The list is sorted by most to least recently visited.

To delete an activity in the list, select **Delete** from the **Actions** menu on the page's row. Click **Save** when you are finished to apply your changes to the system. The system displays a message to confirm that your changes were saved in the database.

3.8 Viewing My Pages

The My Page Overview component contains a list of all the pages you have added to your My Pages list for your active role. To add a page to the My Pages list for your active role, first navigate to the page you want to add. Next, click the **My Pages** arrow on the Menu Bar, and click **Remember this Page**. The page is added to the My Pages list for your active role.

To display the My Page Overview, click the **My Pages** button on the Menu Bar. The component lists all of the pages you added when logged with the same user role that is currently active.

To delete a page from the list, select **Delete** from the **Actions** menu on the page's row. When you are finished, click **Save** to apply your changes to the system.

3.9 Using Trns•port Components

Trns•port displays information in application components. A component is a container for the information and business functions on an application webpage. Components are made up of elements such as fields, lists, and links. A Trns•port webpage can contain one or more components. Some components contain a list of tabs along the left side, each of which corresponds to a subset of information related to the main component.

 **Note:** To protect the information contained in your agency's system, Trns•port components and webpages only display the information and action features for which your active role has been assigned access.

Each component includes these features:

- A blue header is displayed across the top of the component. The component header can contain several features, including the title of the component, a **Save** button, an [Actions](#) button , a Help button , and an expand/collapse button . The header

might also contain contextual information related to the data contained in the component.

- A vertical scroll bar is included on the right side of any component that contains more content than can be viewed in the browser window.
- The most common elements found on components are fields in which information can be recorded. For more information about the types of fields you will use and features for entering data in fields quickly, see [Working with Fields](#).
- Most components contain lists of rows for a type of data, such as projects or proposals. For more information about the kinds of lists you will use and how to find and select the data you need in them, see [Working with Lists](#).
- Components with lists contain a variety of filters to make it easier to find specific rows. For more information about the different kinds of filters you can use and customize, see [Sorting and Filtering Lists](#).
- Actions menus allow you to choose a function or process to perform on data. Most components contain multiple types of **Actions** menus. For more information, see [Using Actions Menus](#). All Actions menus provide access to the files and links attached to the active entity row (see [Working with File Attachments](#) and [Working with Links](#)).
- Selection modal windows are used throughout the system to make it easier for you to add one or more rows of data to another entity (for example, to add projects to a proposal). For information about using modal windows, see [Selecting Data in Modal Windows](#).
- Keyboard keys have limited functionality in components. The **Tab** key can be used to move from one field to the next, the **Enter** key can be used to scroll through a drop down list of values in a field, and the arrow keys can be used to scroll through lists of rows.
- Many components contain tabs arranged vertically on the left side of the component. Clicking each tab displays the fields and information on that tab. Clicking the **Save** button on a tabbed component saves the information on all of the tabs at once.

3.10 Working with Fields

Fields are the most common element found on components. Information can be recorded in fields. You can move from one field to another by pressing the **Tab** key or moving your pointer to the field and clicking the left mouse button.

A component can contain one or more of the following types of fields:

- *Text boxes*, into which you can directly type or delete information. Text boxes that can contain multiple rows of text include a magnifying glass icon on the right side of the box.



Clicking the magnifying glass icon opens a dialog panel that allows you to view and edit the text in a larger area. When you are finished editing text, click the **Apply** button or press the Escape key to close the dialog panel.

- *Numeric fields*, into which you can type only numeric characters. For all non-key numeric fields, the system automatically inserts and corrects the placement of commas and justifies values to the right when you leave the field.
- *Auto-complete fields* are like text boxes except that they automatically display a filtered list of field values based on the first few characters you type into the field. Auto-complete fields are indicated by a magnifying glass icon at the beginning of the field.



Begin typing to search or press Enter

Pressing the **Enter** key without typing any characters returns the first ten rows in that list, displayed as a drop-down menu. To build the list, the system searches for ID and Name/Description values. By default, the first ten rows that match the entered criteria are returned. At the end of the returned list, there is a link to display the next available set of rows and a count of the total number of rows matching the search criteria. A scroll bar allows you to move up and down through the returned list. Pressing the up or down arrow key populates the field with the previous or next value in the drop-down menu. To populate the field, click the appropriate value from the drop-down menu.

- *Date fields* include a calendar button next to the field. Click the calendar button to display a calendar from which you can select a date to populate the field instead of typing the date manually.



The system default date format is MM/DD/YYYY, but your agency might have changed this with agency option settings. Some date fields accommodate a date/time format of MM/DD/YYYY hh:mm:ss.



Note: The value you enter in a date field must be valid and reasonable (for example, it should not exceed 99 years in the future).

- *Drop-down list boxes* include a down arrow next to the field. Click the down arrow to display a list of possible field values.



Click an item in the list to populate the field. A scroll bar is available when needed to scroll through the list of values. Typing a letter cycles the values through all of the values that start with that letter. If there are no values that start with that letter, the value in the select box will not change. Pressing the up or down arrow key scrolls through the open drop down list.

- *Non-editable fields* display information without a text box. You cannot change the information in this type of field.
- *Check boxes* are square boxes that can be selected or cleared by positioning the mouse pointer over them and clicking the left mouse button. Check boxes are used to turn an option on or off.
- *Agency fields* look and behave like any other field, but have been customized for purposes specific to your agency. For this reason, these fields differ among the Trns•port agencies and, unless your agency has created custom agency Help, these fields are not documented in the online help system or this user's guide.

3.10.1 Entering Data in a Range of Fields

The Range Fill feature provides a quick way to copy the same value to the same field on multiple rows of a list. Fields that allow range fill are determined by your agency and are identified by a gray down arrow beside the field's label.

Follow these steps to use the range fill feature:

1. Locate the row and field containing the value you want to copy to a range of fields.
2. Click the **Range Fill** button (gray down arrow) on the field containing the value you want copy.

The system opens the Range Fill overlay.

3. In the **Rows** field, type the number of rows you want in the range that will be filled. If the range you want filled extends downward from the selected field, select the **Down** option or if the range extends upward, select the **Up** option.

Note: Rows with fields that are read-only are included in the count but skipped in the range fill.

4. Alternatively, you can select a check box to copy the value to the field in all of the rows displayed in the component or all of the rows in the list.
5. Click the **Fill** button to fill the range of fields with the copied value. (To close the overlay without filling the range of fields, click the **Close** button.

*The system copies the value to the specified range of fields and displays an **Undo** button beside each field populated with the range fill. Click the **Undo** button on any range filled field to revert to its previous value.*

3.11 Lists

3.11.1 Working with Lists

Many Trns•port components contain lists of rows for a type of data, such as projects or proposals. You can browse list information using the scroll bar on the right side of the component.

You will use several different types of lists in the application:

- *Simple lists* are read-only lists of information. If the rows in a simple list contain enough information, they may be collapsed or expanded.
- *Rolling lists* typically contain only a few fields, and no more than two lines of information per row. Rolling lists are used for quick entry, maintenance, or view. When you open a rolling list, the first row in the list is selected by default. When adding information, new rows are added at the bottom of the list as data is entered, allowing you to move easily from completing one row to the next.
- *Accordion lists* are used to manage rows that require input into more fields than allowed in a rolling list. A row in an accordion list can be expanded or collapsed by clicking the expand/collapse button . One row of information can be edited at a time while other rows are collapsed. Selecting a collapsed row expands the row to display all the information.

A row in an accordion list may also contain a subordinate accordion list. The subordinate list is displayed when a row in the primary list is expanded.

To make it easier to find specific information, you can filter the rows in lists. For more information, see [Using Advanced Sorting and Filtering](#).

Some lists contain links that take you to a Summary component for a specific row.

Grouped Lists

Some components allow data in lists to be grouped relative to a field from that list. For example, in the Project Item Alternate Summary component, the project items are grouped by category (the value in the **Cat ID** field).

The contents of groups can contain rolling lists or accordion lists of rows, and you can expand or collapse rows within groups by clicking the expand/collapse button. You can also expand or collapse all the grouped lists in the component at once by clicking the **Expand All** or **Collapse All** link located at the top right of the list.

Grouped Associations

Grouped associations are similar to grouped lists, except that the data is grouped according to an association between multiple entities, not a field contained in the list. For example, in the Bidder/Quoter Summary component, the quoters associated to each bidder are grouped in a list under the bidder's row.

As in grouped lists, the contents of grouped associations can contain rolling lists or accordion lists of rows, and you can expand or collapse rows within groups by clicking an expand/collapse button. You can also expand or collapse all the grouped lists in the component at once by clicking the **Expand All** or **Collapse All** link located at the top right of the list.

Selection Lists

To select a single data row, click anywhere inside the row. The system adds a green check mark beside each row you select and shades the row blue. To cancel a selection, click the selected row again.

For processes that allow more than one data row to be selected at a time, you can use these features to select multiple rows in a component:

- Select a range of rows by clicking the first row in the range, then pressing the Shift key and holding it down while clicking the last row in the range. The system selects all the rows in between the first and last selected rows.
- Select all the rows in the list by clicking the **Select: All** option just above the list headers.
- To clear multiple selections in a modal window list, click the **Select: None** option just above the list headers.

3.11.2 Sorting and Filtering Lists

System components with lists allow you to sort and filter the list to make it easier to find specific rows. You can create advanced sorts and filters that search on multiple criteria. You can save these settings and reuse them any time you visit the component. In addition, your system administrator might have created agency filters that you share with other users.

If filters have been saved for a component, the system displays a drop-down list to the right of the Quick Find search box. The list contains all of the agency and user-saved filters and sorts for this component and an **Advanced** link. If no filters exist for the component, an **Advanced** link is displayed instead. For information about advanced filters, see [Using Advanced Sorting and Filters](#).

To use a saved filter or sort on the component list, click the down arrow and choose the filter or sort you want to use.

Using the Quick Find Search Box

A Quick Find search box is standard on each component that contains a list. It searches all rows in the list for a string of text and then displays only rows with fields containing that string. Follow these steps to use the Quick Find search box:

1. Click in the Quick Find search box for a list that you want to filter.
2. Type the string of characters you want to match or use as a delimiter. The Quick Find filter is not case-sensitive.

After you type at least three characters and wait a moment, the system refreshes the list and displays the rows that contain the string of characters you entered. This creates a temporary filter.

3. If you want to remove a row from the list of search results, select **Exclude from Search Results** on the **Actions** menu for that row.

The row is removed from the list of search results. You can exclude additional rows as needed.

4. You can adjust the filter by replacing the text in the search box, or you can clear the filter by clicking the **Reset Criteria** icon  on the right side of the search box.

Using Advanced Sorting and Filters

Every system component that contains a Quick Find search box provides an **Advanced** filter link that allows you to create and save custom sorts and filters that search on multiple criteria. You can save sorts and filters permanently for reuse any time you visit the component. Sorts and filters are associated only with the component on which they are built.

When you click the **Advanced** link, the system displays the Advanced Filter overlay with three sections titled *Filters*, *Sort*, and *Apply Settings*. It also contains a **Close** button in the top right corner.

Filters

Follow these steps to create a filter:

1. Click the down arrow in the field below the Filters header to display a list of all the columns in the component (including hidden columns). Select the column you wish to filter.

The system displays a list of operators appropriate for the chosen column and a field for entering the value you want to match (depending on the column you are filtering, this may be a text box, a check box, or a tool for selecting a date).

2. Click the down arrow and select the operator you want to use to narrow your filter.

Depending on the column, operators can include:

Contains
Does Not Contain
Begins with
Is Equal To (=)
Is Not Equal To
Greater Than (>)
Less Than (<)
Greater Than or Equal To (>=)
Less Than or Equal To (<=)
Is Blank
Is Not Blank
Is On
Is Not On
Is Earlier Than
Is Earlier Than or On
Is Later Than
Is Later Than or On
Is Later Than
Within Past ___ Days

For more information about operators, see [Using Operators with the Advanced Filter](#).

3. Enter the value you are trying to match or want to use as a delimiter (if a text box, the filter is not case-sensitive).
4. You can create multiple clauses in your filter. To add a second clause, select **And** or **Or** to join the first clause with the second. Then enter column, operator, and value as in steps 1-3. When multiple filter clauses are joined using the **And** or **Or** operators, the system follows the standard order of operations where **And** has precedence over **Or**.

To remove a clause from the filter, click the **Delete** button to the right of the clause.

Sort

Follow these steps to create a sort:

1. Click the drop-down list to select a field on which to sort.
2. The list will sort on the field in ascending order by default; if you want to sort in a descending order, select the **Sort descending** check box for that criterion.

3. You can add more than one sorting criterion by selecting a second field. For example, you can have the Proposals Overview component sorted first by **Created Date**, then by **Proposal ID**. In this case, the system first sorts proposals by the date they were created (in ascending order by default). If two proposals were created on the same date, those two are ordered by their proposal ID (again, ascending by default).

To remove a criterion from the sort, click the **Delete** button to the right of the criterion.

Apply Settings

If you do not want to save your settings and only want to apply them right now, click the **Apply without saving** link. The system returns you to the list and immediately sorts or filters the selected component.

If you want to save your settings, follow these steps:

1. In the **Save as** text box, type the name by which you want to save the filter or sort. The name must be different from any other filter or sort saved by you for this component.
2. If you want the filter or sort to be used as the default for this component, select the check box labeled **Make this the default setting**.
3. Click the **Save and Apply** button.

The system takes you back to the list and immediately sorts or filters the selected component.

Modifying Saved Settings

You can modify the filter and sort settings that you save. You cannot modify agency filters. To modify settings, open the Advanced Filter overlay and select the filter or sort you want to modify. Change information in fields, operators, and values as needed.

Deleting Saved Settings

To delete saved filter and sort settings, open the Advanced Filter overlay and select the filter or sort you want to delete in the **Editing** field. Click the **Delete this setting** link.

3.11.3 Using Operators with the Advanced Filter

The following table shows which filter operators can be used with the Advanced Filter to filter different kinds of data. If you filter data with an inappropriate operator, all of the data in the list will be filtered out and you will be returned to an empty list.

Data Type	Contains, Does Not Contain	Comparisons (=, <, <=, >, >=, ≠)
Character	Yes	Yes
Numeric	No	Yes. The filter value must be a valid number (for example, <i>length</i> cannot be entered as the filter value because it is not a number). Note: When a filter is applied to a numeric column, null and blank values within the column are treated as lower than any numeric value.
Date	No	Yes. The filter value must be a valid date. A blank value may only be used with = and ≠.
Longitude/Latitude	Yes	Yes. The filter value must be a valid latitude or longitude in dd:mm:ss.ss format.
Boolean	No	You can only use = and ≠. The filter value must be a valid Boolean (valid formats are y/n, true/false, yes/no).

Table 3-2. Advanced Filter Operators

3.12 Using Actions Menus

Actions menus allow you to choose a function or process to perform on data. **Actions** menus are located throughout the application and are accessed by clicking an **Actions** button . There are four types of **Actions** menus, each of which performs actions on a different level of data. All application pages contain at least one type of **Actions** menu, many contain two or three, and some contain all four types.

3.12.1 System Actions Menu

The **Actions** menu for system-level functions and processes is located on the [Menu Bar](#), a horizontal strip at the top of every Trns•port webpage. Clicking the **Actions** button opens the **Actions** menu. The functions and processes listed are limited to those that are relevant for your currently active role (the role currently selected on the **Home** menu). When you select a menu option, the system takes you to the component in the system where the action can be performed.

3.12.2 Component Actions Menus

Component **Actions** menus contain functions and processes that can be performed on the component level, for example, adding or importing a new project. The button for this type of **Actions** menu is on the component header. The menu options may be grouped into categories, such as Actions, Views, Tasks, and Reports. When you select a menu option, the system automatically takes you to the component in the system where the action can be performed.

3.12.3 List Actions Menus

List **Actions** menus contain functions and processes that can be performed on a list, for example, adding items to a project item list. The button for this type of **Actions** menu is located below the component header, directly above the list. When you select a menu option, the system automatically takes you to another component or opens a selection modal window where the action can be performed.

3.12.4 Row Actions Menus

Row **Actions** menus contain functions and processes that are performed on an individual data row in a list, for example, adding or deleting an item. The **Actions** button is located on the right side of each row. When you select an action from the menu, the action is performed only on the data in the row on which the menu is located. Menu options may be grouped into categories, such as Actions, Views, Tasks, and Reports.

When you select some menu options, the system automatically takes you to another component in the system where the action can be performed.

Duplicating and Inserting Rows

On rolling and accordion lists, when you click the **New** button, the system automatically adds the new row as the last row in the list. If you want to add a new row in a specific location within the list, select **Insert Row** from the **Actions** menu on the row where you want the new row to appear. The system adds a new row directly above the selected row.

If you are adding a row that is similar to an existing row, you can save the time it would take to enter all the identical information by duplicating the existing row and assigning it a new identifier. You can then make any minor changes required for the new row. To duplicate a row, select **Duplicate Row** from the **Actions** menu on the row you want to duplicate. The system adds a new row directly beneath the source row.

3.12.5 Other Common Action Menu Options

Actions menus provide the following other types of options that are available on the component for the selected data:

- Access to attached files and links (see [Working with File Attachments](#) and [Working with Links](#)).
- Views (for example, viewing an addenda for a proposal).
- Tasks that can be performed (for example, exporting data or running a process).
- Reports that can be generated.

3.13 Selecting Data in Modal Windows

A *modal* window is a secondary pop-up window associated with a component. While a modal window is open, you cannot work in the associated component. Modal windows are used when you add one or more rows of data to an entity. For example, when you add projects to a proposal, you use a modal window to select the projects you want to add.

Each modal window includes a Quick Find search box to help you find the data you want to add. To select data to add, click anywhere inside its row. The system adds a green check mark beside each row you select and shades the row blue. To cancel a selection, click the selected row again.

Some processes allow more than one row to be added at a time, and for those you can select multiple rows in the selection modal window. You can also use these features to select multiple rows of data:

- Select a range of rows by clicking the first row in the range, then pressing the Shift key and holding it down while clicking the last row in the range. The system selects all the rows in between the first and last selected rows.
- Select all the rows in the list by clicking the **Select: All** option at the top of the list.
- To clear multiple selections in a modal window list, click the **Select: None** option at the top of the list.

When you have selected all the data you want to add in a selection modal window, click the **Add** button. If you are working with a long list, you can click the **Top of Window** link to quickly return to the top of the list.

The system closes the modal window and takes you back to the component where you were working with the new data added to the list.

3.14 Frequently Asked Questions

This section presents answers to some of the questions we hear most frequently from Trns•port users like you. We hope you find them helpful and informative.

 **Caution:** The information provided on this page is intended as a helpful resource for Trns•port users. For best results, however, do not download plug-ins (such as a spell checker) for your browser or change your established web settings (such as the pop up blocker) without first consulting the system administrator for your agency.

Can I use my browser's search functionality?

Yes. All supported browsers include a built-in search function to find a string of data on a single webpage. You can use this browser feature in addition to the built-in features within the Trns•port Web application. If you have a large list and want to immediately find a row without filtering the page, you can use your browser's search feature to jump right to the desired value.

Can I use my browser's Back button?

A better alternative to your browser's **Back** button is the system's **Recent** menu with links to recently visited pages.

Beware of the **Back** button! Yes, you can use the **Back** button, but be aware that it simply returns you to a snapshot of the page you were previously visiting. This could also result in changes to the current page not being saved. Clicking the **Back** button may or may not retrieve the actual page from the server, therefore the data that you see on the page might be out of date and cause confusion. For that reason, you should avoid using the browser **Back** button if possible. If you are unable to navigate using the provided links within the Trns•port Web application for any reason, the **Back** button can be used, but only as a last resort.

The back function is available in a number of ways through the browser; the most common is the **Back** button on the Address bar. It can also be accessed by selecting **Back** from the right mouse button menu anywhere on a webpage, through a keyboard shortcut (**Alt+Left**), and from the **History** menu. Any of these will return you to a snapshot of the page you were previously visiting.

Can I use my browser's Refresh button?

Yes, you can use the **Refresh** button, however, as with the **Back** button, you may lose information you have recently changed on the page. When you click the **Refresh** button, the browser returns you to the page as it was the last time you clicked **Save**. Therefore, any changes you have made to the page without saving will be lost.

The refresh function is available in a number of ways; the most common is the **Refresh** button in the browser's Address bar. It can also be accessed by pressing a keyboard shortcut (**F5**) or by choosing **Refresh** from the **View** menu.

Can I use the Tab and arrow keys on my keyboard?

Keyboard keys have limited functionality in the system. The Tab key can be used to move from one field to the next, the Enter key can be used to scroll through a drop down list of values in a field, and the arrow keys can be used to scroll through lists of rows.

Does the Trns-port Web application provide a spell checking feature?

Spell checking is a feature that is either already available within your Web browser or can be easily added to your browser. You can use your browser's spell checking feature on all Trns-port text fields.

Why won't my browser allow me to download files?

The ability to download files is often controlled by your browser settings. If you have selected high security options for downloading files or enabled a pop-up blocker, this may interfere with your ability to import and export information to and from other Trns-port applications. However, because browser settings may affect many other agency functions, consult your systems administrator before making any changes.

Why do some number fields not sort properly?

If a field containing numbers (for example, a line number field) is not sorting properly, it is because it is defined as a character field, even though numbers are valid values. If you want a character field to sort numerically, you must place the numeric sort base validation rule on that field in the metadata (see Data Validation (IsNumber) for more information). Creating zero fill character fields can also improve sorting on character fields (see Creating Zero Fill Character Fields).

3.15 My Settings

3.15.1 Managing My Settings

The My Settings component contains information about your user account. Information is grouped in two tabs, located on the left side of the component. To go to your My Settings component, select **My Settings** from the **Actions** menu on the Menu Bar.

The My Settings component opens on the **User Information** tab, which allows you to view, but not change the following user information for your user account:

- First Name
- Last Name
- Person ID

When the New User Help check box is selected, the system opens the Role-Based Workflows help topic when you click the **Help** button on the Menu Bar. This section of the Help provides an orientation to the system for specific roles. To enable this feature for your user account, select the New User Help check box, and click the **Save** button. To disable this feature, clear the check box, and click **Save**.

If an email address has been entered for your user account, the **Email** tab is displayed. If the **Email** tab is not displayed and you want to enter your email address, contact your system administrator.

Email Click the **Email** tab to view or change your existing email address. For more information, see [Changing Your Email Address](#).

3.15.2 Changing Your Email Address

The **Email** tab on the My Settings component contains the email address currently recorded for your user account and allows you to change the address.

To record or change your email address, follow these steps:

1. Select **My Settings** from the **Actions** menu on the Menu Bar.

Note: If an email address has been entered for your user account, the **Email** tab is displayed. If the **Email** tab is not displayed and you want to enter your email address, contact your system administrator.

2. On the My Settings component, click the **Email** tab.
3. Click in the **New Email Address** field and type your new email address.
4. Click in the **Confirm Email Address** field and type the new email address a second time.
5. Select **Confirm Email** from the **Actions** menu on the component header.

If the two email addresses match, the system saves the new email address in the database.

3.16 Attachment Files and Links

3.16.1 Working with Attachments

Attachments provide an easy way to integrate outside information of various kinds into your project, proposal or any other system entity. Examples of the types of files you might attach include Microsoft® Word documents, Excel spreadsheets, PDFs, URLs, digital photographs and other types of graphic files.

Attachments are accessed on any component by clicking the **Actions** menu on a row or component header.

 **Note:** Deleting an entity automatically deletes that entity attachments as well as any attachments belonging to child rows of the entity. The system does *not* delete the attachments belonging to any associated entities (for example, if you delete a proposal, its associated projects are not deleted, nor would the projects' attachments).

The Attachments Overview component contains a list of rows for all the files that have been attached to the entity by you or another user with your active role. The system displays the following fields for each file attachment in the list:

- Name
- Description
- Historical Report
- Attorney/Client Privilege
- Size (kb)

If other roles have been granted permission to access an attachment, the attachment's row will also display a count of how many roles are permitted access.

To make changes to an attachment, click anywhere in the attachment's row. The system highlights the row in blue and displays information in labeled fields. You can add or change information in the **Description** and **Attorney/Client Privilege** fields. Subordinate rows are displayed for any additional roles that have been granted access to the attachment.

To open the attachment, click the blue link in the **Name** field. The attachment opens in the application with which it is associated on your local computer. For example, .xls files are usually associated with Microsoft Excel and if you open an .xls file attachment, it will open in the Microsoft Excel application. If your computer does not have an application associated with a file you are opening, you must save it and then choose an appropriate application in which to open the file.

 **Note:** Depending on your browser settings, if you open an attachment that is associated with the browser (rather than another application), the attachment might not open in a separate window. That is, you might leave the webpage on which you were working and go to a new temporary webpage that displays the file. To return to the webpage on which you were working, click the browser's Back button.

To delete an attachment, select **Delete** from the **Actions** menu on the attachment's row. The system shades the row gray to indicate it is marked for deletion. Click **Save** to complete the deletion, or click the **Undo** button to reverse the action.

If your role has been granted permission by another user to access a file attached to an entity you cannot access, you can view this attachment on the Attachments tab of the Global Attachments Overview component (select **Global Attachments** from the **Actions** menu on the Menu Bar).

Attaching a File to a Row

Follow these steps to attach a file to a row:

1. Navigate to an Overview or Summary component that contains the row to which you want to attach the file.
2. Select **Attachments** from the **Actions** menu on the row (if you are viewing an Overview component) or the component header (if you are viewing a Summary component).

The system takes you to the Attachments Overview component for the row.

3. Click the **Select File** button.

*The system opens a **Choose File to Upload** window.*

4. In the **Choose File to Upload** window, navigate to the file you want to attach, select it, and click the **Open** button.

Note: File size restrictions or recommendations may apply. Check with your system administrator for the maximum file size your agency will allow for an attachment.

The system begins the upload process and closes the Choose File to Upload window. When the upload process is finished, the system adds the new row to the bottom of the list in the File Attachments Overview.

5. It is not required, but you can enter information in the **Description** field to record additional information about the file attachment.
6. Click **Save** to save the attachment to the row.

Granting Security Access to an Attached File

Follow these steps to allow users with other roles to access an attached file:

1. Locate the attachment for which you want to grant access.
2. Choose **Select Roles** from the **Actions** menu on the attachment's row.

The system displays a modal window for selecting roles.

3. In the modal window, use the Quick Find search box to locate the role to which you want to grant access, or click **Show first 10**.

The system lists all the roles that meet your search criteria.

4. Click the row for each role you want to grant access.

The system adds a green check mark beside each role you select and shades the row blue. To cancel a selection, click the selected row again.

5. Click the **Add to Attachment** button.

The system closes the modal window and takes you to the Attachments Overview with the new roles added as subordinate rows to the attachment's row.

6. Click **Save**.

The system displays a message to confirm that your changes were saved in the database.

Removing Security Access to an Attached File

Follow these steps to remove access to an attached file:

1. Locate the attachment for which you want to remove access.
2. Expand the attachment row to display rows for the roles that are assigned access to the attachment.
3. To remove security access for a role, click the **Delete** button on the role's row.
4. When you are finished, click the **Save** button.

The system displays a message to confirm that your changes were saved in the database.

3.16.2 Working with Links

You can attach a link to an outside Web site address (also known as a *URL*) to your project, proposal, or any other entity in the system. Any user with your active role who has permission to access the entity will be able to access the attached link. You can also give users whose role does not allow them access to the entity permission to access the attached link.

You can access links on any component by clicking the **Actions** menu on a row or component header, and then clicking the link you want to follow.



Note: Deleting an entity row automatically deletes that entity row's links as well as any links belonging to child rows of the entity. The system does not delete the links belonging to any associated entity rows (for example, if you delete a proposal, its associated projects are not deleted, nor would the projects' links).

The Links Overview component contains a list of rows for all the links that have been attached to the entity by you or another user with your active role. You can access the Links

Overview by selecting **Links** from the **Actions** menu on a row or Summary component header. The system displays the following fields for each link in the list:

- Link
- URL
- Link Name
- Description

If other roles have been granted permission to access the link, the row will also display the total number of roles that have access.

To make changes to a link, click anywhere in the link's row. The system highlights the row in blue and displays information in labeled fields. You can add or change information in any field except the **Link** field. Subordinate rows are displayed for any additional roles that have been granted access to the link.

To go to a linked website, click the blue link in the **Link** field. The system opens the website in a separate browser window.

To delete a link, select **Delete** from the **Actions** menu on the link's row. The system shades the row gray to indicate it is marked for deletion. Click **Save** to complete the deletion, or click the **Undo** button to reverse the action.

When you are finished adding or changing links, click the **Save** button to apply your changes to the system (including deleted information). The system displays a message to confirm that your changes were saved in the database.

If your role has been granted permission by another user to access a link attached to an entity you cannot access, you can view this attachment on the **Links** tab of the Global Links Overview component (select **Links** from the **Actions** menu on the Menu Bar).

Attaching a Link to an Entity

Follow these steps to attach a new link to an entity:

1. Navigate to the entity to which you want to attach the link.
2. Select **Links** from the **Actions** menu on the entity's row or the component header.

The system takes you to the Links Overview component for the entity.

3. Click the **New** button.

The system adds a new row at the bottom of the rolling list of existing links. All fields in the new row are blank.

4. To create a link, you must enter information in the URL and Link Name fields.

5. It is not required, but you can enter information in the Description field to record additional information about the link.
6. Click **Save** to save the link to the entity.

Granting Security Access to a Link

Follow these steps to allow users with other roles to access an attached link:

1. On the Links Overview page, locate the link for which you want to grant access.
2. Choose **Select Roles** from the **Actions** menu on the link's row.

The system displays a modal window for selecting roles.

3. In the modal window, use the Quick Find search box to locate the role to which you want to grant access, or click **Show first 10**.

The system lists all the roles that meet your search criteria.

4. Click the row for each role you want to grant access.

The system adds a green check mark beside each role you select and shades the row blue. To cancel a selection, click the selected row again.

5. Click the **Add to Link** button.

The system closes the modal window and takes you to the Links Overview with the new roles added as subordinate rows to the link's row.

6. Click **Save**.

The system displays a message to confirm that your changes were saved in the database.

Removing Security Access to a Link

Follow these steps to remove security access for a role:

1. On the Links Overview page, locate the link for which you want to remove access.
2. Expand the link row to display rows for the roles that have access to the link.
3. Click the **Delete** button at the end of the row for each role from which you want to remove access.

*The system shades the row gray to indicate it is marked for deletion. To reverse the delete action, click the **Undo** button.*

4. Click **Save**.

The system displays a message to confirm that your changes were saved in the database.

3.16.3 Using Global Attachments

The Global Attachments Overview component allows you to view and change two types of global attachments:

- *Attachments* are attached files that you have permission to view, but are attached to entities you do *not* have permission to access.
- *System Attachments* are files that are not attached to a specific entity.

You can access the Global Attachments Overview from any page in the application by selecting **Global Attachments** from the **Actions** menu on the Menu Bar. Attachments are grouped in two tabs, located on the left side of the component. The component opens on the **Attachments** tab. To access system attachments, click the **System Attachments** tab.

On either tab, locate a specific file attachment by typing criteria in the Quick Find search box or by clicking **Show first 10**. The system displays a list of rows for all the attachments that match your search criteria. Each row contains an **Actions** button and current values for the following fields:

- Name
- Description
- Historical Report
- Attorney/Client Privilege
- Size (kb)
- Associated To

If other roles have been granted permission to access an attachment, the attachment's row will also display a count of how many roles are permitted access.

To open the attachment, click the blue link in the **Name** field. The attachment opens in the application with which it is associated on your local computer. For example, .xls files are usually associated with Microsoft Excel and if you open an .xls file attachment, it will open in the Microsoft Excel application. If your computer does not have an application associated with a file you are opening, you must save it and then choose an appropriate application in which to open the file.



Note: Depending on your browser settings, if you open an attachment that is associated with the browser (rather than another application), it may not open in a separate window (that is, you may leave the webpage on which you were working and go to a new temporary webpage that displays the file). To return to the webpage where you were working, click the browser's back button.

To make changes to an attachment, click anywhere in the attachment's row. The system highlights the row in blue and displays information in labeled fields. You can add or change information in the **Description** and **Attorney/Client Privilege** fields.

Subordinate rows are displayed for any additional roles that have been granted access to the attachment. You can remove role access for system attachments you created by clicking the **Delete** button on the role's row. You cannot remove role access for system attachments you did not create.

To delete an attachment, select **Delete** from the **Actions** menu on the attachment's row. The system shades the row gray to indicate it is marked for deletion.

When you have finished making changes to global attachments, click the **Save** button to apply your changes to the system (including deleted information). The system displays a message to confirm that your changes were saved in the database.

Granting Security Access to an Attachment

Follow these steps to allow users with other roles to access an attachment:

 **Note:** You can only grant access to other roles for system attachments that you created.

1. Locate the attachment for which you want to grant access.
2. Choose **Select Roles** from the **Actions** menu on the attachment's row.

The system displays a modal window for selecting roles.

3. In the modal window, use the Quick Find search box to locate the role to which you want to grant access or click **Show first 10**.

The system lists all the roles that meet your search criteria.

4. Click the row for each role to which you want to grant access.

The system adds a green check mark beside each role you select and shades the row blue. To cancel a selection, click the selected row again.

5. Click the **Add to Attachment** button.

The system closes the modal window and takes you to the Global Attachments Overview with the new roles added as subordinate rows to the attachment's row.

6. Click **Save**.

The system displays a message to confirm that your changes were saved in the database.

3.16.4 Using Global Links

Links provide a convenient way to access an outside web site while working in the Trns•port system.

The **Global Links Overview** component allows you to view and change two types of global links:

- *Links* are links that you have permission to access, regardless of whether you have permission to access the entities associated with the links.
- *System Links* are links that are not attached to a specific entity.

You can access the Global Links Overview from any page in the application by selecting **Global Links** from the **Actions** menu on the Menu Bar. Links are grouped in two tabs, located on the left side of the component. The component opens on the **Links** tab. To access system links, click the **System Links** tab.

On either tab, locate a specific link by typing criteria in the Quick Find search box or clicking **Show first 10**. The system displays a list of rows for all the links that match your search criteria. Each row contains an **Actions** button and current values for the following fields:

- Link
- URL
- Link Name
- Description
- Associated To

If other roles have been granted permission to access a link, the link's row will also display a count of how many roles are permitted access.

To go to a linked Web site, click the blue link in the **Link** field. The system opens the Web site in a separate browser window.

To make changes to a link, click anywhere in the link's row. The system highlights the row in blue and displays information in labeled fields. You can add or change information in any field except the **Link** field.

Subordinate rows are displayed for any additional roles that have been granted access to the link. You can remove role access for system links you created by clicking the **Delete** button on the role's row. You cannot remove role access for system links you did not create.

To delete a link, select **Delete** from the **Actions** menu on the link's row. The system shades the row gray to indicate it is marked for deletion.

When you have finished making changes to global links, click the **Save** button to apply your changes to the system (including deleted information). The system displays a message to confirm that your changes were saved in the database.

Granting Security Access to a Link

Follow these steps to allow users with other roles to access a link:

 **Note:** You can only grant access to other roles for system links that you created.

1. Locate the link for which you want to grant access.
2. Choose **Select Roles** from the **Actions** menu on the link's row.

The system displays a modal window for selecting roles.

3. In the modal window, use the Quick Find search box to locate the role to which you want to grant access or click **Show first 10**.

The system lists all the roles that meet your search criteria.

4. Click the row for each role you want to grant access.

The system adds a green check mark beside each role you select and shades the row blue. To cancel a selection, click the selected row again.

5. Click the **Add to Link** button.

The system closes the modal window and takes you to the Global Links Overview with the new role(s) added as subordinate rows to the link's row.

6. Click **Save**.

The system displays a message to confirm that your changes were saved in the database.

3.17 Processes

3.17.1 Viewing Process History

The **Process History Overview** component allows you to check on the status of all processes you are running at any time, including system and scheduled processes.

You can access the Process History Overview from any page in the application by selecting **View Process History** from the **Actions** menu on the Menu Bar.

The Process History Overview contains a list of processes that have been executed. The component opens on the **Process History** tab, which allows you to view the status and output of processes you have generated manually.

 **Note:** The finish time and success of a process is not displayed until the process concludes and the page is refreshed.

You can locate a specific process by typing criteria in the Quick Find search box. You can also filter the list to show only recent, older, or processes currently running by selecting the appropriate value in the **Status** field above the list.

Each process row contains this information:

- Process Name
- User ID
- Success
- Reviewed
- Start Time
- Finish Time
- Output Files

 **Note:** The finish time and success of a process is not displayed until the process concludes and the page is refreshed.

 **Note:** Generated reports do not display in the process history unless they were scheduled.

 **Note:** If the output file that results from a process exceeds 100 MB in size, then the output is stored in multiple files with a maximum size of 50 MB each.

Process history rows can be deleted in this component, but not changed. To delete a process history row, click the **Delete** button on that row. When you have finished deleting process history rows, click the **Save** button to apply your changes to the system. The system displays a message to confirm that your changes were saved in the database.

If output files have been generated by the process, the file name appears as a blue link in the **Output Files** field. You can open the output file to view it or save it by clicking the blue link. For more information, see [Viewing and Saving Process Output Files](#).

 **Note:** When you click the output files link, the system automatically marks the process history row as having been reviewed.

3.17.2 Viewing and Saving Process Output Files

If output files have been generated by a process, the output file name appears as a blue link in the **Output Files** field on the Process History Overview component. You can open the output file to view it or save it by clicking the blue link.



Note: When you click the output files link, the system automatically marks a process history row as having been reviewed.

Viewing an Output File

Follow these steps to view a process output file:

1. Click the blue link in the **Output Files** field on the Process History Overview component.

The system opens a File Download dialog window.

2. Select the **Open** option in the window.

*The output file opens in the application with which it is associated on your local computer. For example, *.log files are usually associated with a text editor and if you open a *.log file, by default it will open in Microsoft Notepad. If your computer does not have an application associated with a file you are opening, you must save it and then choose an appropriate application in which to open the file.*

Depending on your browser settings, if you open an attachment file that is associated with the browser (rather than an application), it may not open in a separate window (that is, you may leave the webpage on which you were working and go to a new temporary webpage that displays the file). To return to the Trns•port webpage on which you were working, click the browser's back button.

Saving an output file

Follow these steps to save an output file:

1. Click the blue link in the **Output Files** field on the Process History Overview component.

The system opens a File Download dialog window.

2. Select the **Save** option in the window.
3. Follow browser directions to save the file.

3.18 Email Messages

3.18.1 Working with Email Messages

The Outbox Overview component enables you to view and delete email messages sent within the system from the current user account. It also enables you to send new messages to other system users.

You can display the Outbox Overview component by selecting **My Outbox** from the **Actions** menu on the Menu Bar.

The Outbox Overview component includes an expandable list of sent messages. Each sent message row includes an **Actions** button and values for the Recipients, Subject, and the Date fields.

You can expand a message row to view the Message Text, along with the user account and email address that were used to send the message.

To send a new message to another system user, click the **Create Message** button. The system takes you to the Create Message component. For more information, see [Creating an Email Message](#).

To delete a sent message from the system, select **Delete** from the **Actions** menu on the message row. The system shades the row gray to indicate it is marked for deletion. To reverse the delete action, click the **Undo** button.

Click the **Save** button to apply your changes. The system displays a message to confirm that your changes were saved.

You can create recipient groups by clicking the [Dynamic Mailing Group](#) Quick link. For more information, see [Creating Dynamic Mailing Groups](#).

3.18.2 Creating an Email Message

The Create Message component enables you to send an email message from the current user to another system user. In order to send a message, an email address must be recorded in the system for both the sender and the recipient user accounts.

 **Note:** You can enter email addresses for the person associated with a user account by using the Person Summary component (see Maintaining Addresses for a Person).

To create a new message, perform the following steps:

1. Select **My Outbox** from the **Actions** menu on the Menu Bar.

The system takes you to the Outbox Overview component.

2. Click the **Create Message** button.

The system takes you to the Create Message component.

3. Type a value in the Recipient box to search for or enter the message recipient. The recipient can be an individual or a pre-defined mailing group (see [Creating Dynamic Mailing Groups](#)).
4. To add another recipient, click the **New** button.

The system adds another recipient row.

Note: When a message has more than one recipient, the recipient names and email addresses are hidden from other recipients of the message.

5. Type a value in the second Recipient box to search for or enter another message recipient. Continue adding recipients as needed.

Note: If you want to select multiple recipients at the same time, choose **Select Recipients** from the **Actions** menu on the recipient list. For more information, see the [Selecting Multiple Recipients](#) section below.

6. Type a value in the Subject box.
7. In the Message Text box, type the contents of your email message.
8. When you are finished, click the **Send** button.

The system takes you to the Outbox Overview component and displays a message to confirm that your email message was sent. The email you sent is added to the top of the list of sent messages.

Selecting Multiple Recipients

If you want to send a message to several recipients, you can select all of them at once.



Note: When a message has more than one recipient, the recipient names and email addresses are hidden from other recipients of the message.

To select multiple recipients, perform the following steps:

1. On the Create Message component, choose **Select Recipients** from the **Actions** menu on the recipient list.

The system displays the Select Recipients modal window.

2. Locate the recipients you want by typing criteria in the Quick Find search box, or by clicking **Show First 10**.

The modal window lists possible recipients that match your criteria. Each row of user data shows the Name, Email Address, Type, Address Type, and Default values for the user account.

3. Click a row to select the user as a recipient.

A green check mark appears at the beginning of the row to indicate it is selected.

4. Continue selecting user rows as needed. You can click a row again to clear the selection.
5. When you are finished selecting recipients, click the **Add to Message** button at the top of the modal window.

The system closes the modal window and adds the recipients you selected to the list on the Create Message component.

3.18.3 Creating Dynamic Mailing Groups

On the Dynamic Mailing Groups component, you can view and maintain mailing groups. A mailing group is a collection of names and email addresses that can be selected as the recipient of an email message. You create a mailing group by setting up one or more filters. A mailing group can include email addresses for a person, vendor, administrative office, or other entity that has an email address entered in the system. If the system stores more than one email address for a person or entity, the default email address is used for the mailing group. If no default is specified, all recorded email addresses for the person or entity are included.

To go to the Dynamic Mailing Groups component, select **My Outbox** from the **Actions** menu on the Menu Bar. On the Outbox Overview component, click the [Dynamic Mailing Groups](#) Quick link.

The Dynamic Mailing Groups component lists the mailing groups already set up in the system. Each row includes an **Actions** menu and the mailing group Name. When you expand a mailing group row, you can view the filter criteria that define the mailing group.

Filter criteria are statements that include a field, an operator, and an expected value. For example, filter criteria can narrow the possible recipients to only those whose email addresses contain *DOT*. Each mailing group can include multiple filter criteria statements to further narrow the recipient list.

To create a new mailing group, following these steps:

1. Click the **New** button.

A new mailing group row is added to the bottom of the list of mailing groups.

2. Enter a descriptive name for the mailing group in the Name field.
3. In the **Filter** section, click the arrow in the first filter box.
4. On the drop-down menu, select a field that will be used to filter the recipients included in the mailing group.

*The field name you selected is displayed in the first filter box, and additional boxes are shown in the **Filter** section.*

5. Click the arrow in the next filter box.
6. On the drop-down menu, select an operator for the filter, such as Contains, Begins With, or Equal To.

The operators available on this menu vary according to which field you selected in the first filter box.

7. To view a preview of the user names and email addresses that will be included in the mailing group as a result of the filter criteria statement, click the **Test Filter Results** button.

User names and email addresses that match your criteria are listed at the bottom of the mailing group row. If filter criteria statement you entered does not produce any results, change the criteria as needed.

8. You can continue adding additional filter criteria statements to further narrow the list of recipients. You can delete a criteria statement from the mailing group by clicking the **Delete** button to the right of the statement.
9. When you are finished specifying filter criteria, click **Save**. When you create an email message, you can select a mailing group as the recipient. All of the users and email addresses that match the filter criteria in the mailing group are included as recipients of the message.

To maintain a mailing group, click in a field and add, delete, or change information as needed.

To delete a mailing group, select **Delete** from the **Actions** menu on the mailing group row. The system shades the row gray to indicate it is marked for deletion. To reverse the delete action, click the **Undo** button.

Click the **Save** button to apply your changes. The system displays a message to confirm that your changes were saved.

10 Reports

10.1 Working with Reports

You can generate reports from any page in the system by clicking the **Actions** menu on the Menu Bar and then clicking **Generate Report**.

 **Note:** Your agency determines which reports are available to you through the security settings of your active role and by agency customizations to the application. As a result, some reports might not be available to you.

Follow these steps to generate a report:

1. Select **Generate Report** from the **Actions** menu on the Menu Bar.

*The system takes you to the **Generate Report** component, which lists all the reports you can generate.*

2. In the list of reports, click the row for the report you want to generate.

The system adds a green check mark beside the report you selected.

3. If data is required, it will be noted in the **Data** column. To select the data required for the report, choose **Select Data** from the **Settings** menu on the component subheader.

*The system displays a Quick Find search box for locating the appropriate type of data for the report. Type criteria in the Quick Find search box, or click **Show first 10**. The system displays a list of all the records in the system that match your search criteria. Select the records you want to include in the report.*

4. If you need to select parameters for generating the report, select **Set Parameters** from the **Settings** menu on the component subheader.

The system displays parameter options for the selected report. Select appropriate

options in the parameters window. For more information, see [Using Report Parameters](#).

5. By default, reports are generated in PDF format. If you want your report generated in HTML format, select **Output Options** from the **Settings** menu on the component subheader, and click the option labeled **Generate as HTML**.
6. If you want to specify the layout source for the report, select **Output Options** from the **Settings** menu on the component subheader. For more information about the report layout source, see [Choosing a Report Layout Source](#).
7. Click the **Execute** button on the component header.

The system generates the report and displays it in a new browser window. Use your browser's print function to print the report if you need a printed copy.

*(If you selected the option to generate the report in HTML format, the system displays a file Download window. Click the **Open** button, and the system displays the HTML report in a new browser window.)*

10.2 Using Report Parameters

When you generate a report, you may need to choose parameter settings in order for the system to generate the report properly. Parameter options are displayed on the Generate Report component when you select **Set Parameters** from the **Settings** menu on the component subheader.

Depending on your security settings and how your agency has designed the report you are running, the system displays one or more of the following parameter options for the selected report.

Dates: Some reports require a start and/or end date parameter in order to select the correct data. You can type the date directly in the date field or use the calendar lookup to select a date.

Subreports: If you are generating a report that is comprised of two or more subreports, you can choose which subreports you want to include.

Report Output Type: Choose whether you want to generate the report in PDF or HTML format.

Report Layout Source: Select the type of report layout template you want to use:

Base Select this option to use the system's base layout for this report.

- Custom** Select this option to use your agency's custom layout for this report. This is the default option. If you choose this option and there are no reports stored in the Custom component, the system uses the base layout for your report.
- Test** Select this option if the report format you want to use is currently being customized (and therefore stored in the test area of your Web server). If you choose this option and there are no reports stored in the test area, the system uses your agency's custom layout for your report, and if no reports are stored there, then the base layout is used.

10.3 Proposal Vendor DBE Commitment Report

This report is automatically generated and displayed in Step 1 of the guided process used by the proposal vendor to sign a DBE commitment. It can also be generated by selecting **Generate Report** from the **Actions** menu on the Menu Bar.

The report contains all the details of the DBE commitment. It presents total commitment information for the proposal vendor as well as a breakdown for each DBE vendor that includes work type, supplier, and trucking information.

10.4 Proposal Vendor DBE Commitment Verification Report

This report is automatically generated and displayed in Step 2 of the guided process used by the proposal vendor to sign a DBE commitment for an agency proposal. It can also be generated by selecting **Generate Report** from the **Actions** menu on the Menu Bar.

The report contains general identification information for the proposal and proposal vendor, summary information about the DBE commitment being signed, and the agency's verification requirement for the proposal vendor's signature.

10.5 Contract Current DBE Commitment Report

This report is automatically generated and displayed in Step 1 of the guided process used by the prime contractor to sign a revised DBE commitment for an agency contract. It can also be generated by selecting **Generate Report** from the **Actions** menu on the Menu Bar.

The report contains all the details of the revised DBE commitment. It presents total commitment information for the prime contractor as well as a breakdown for each DBE vendor that includes work type, supplier, and trucking information.

10.6 Contract Current DBE Commitment Verification Report

This report is automatically generated and displayed in Step 2 of the guided process used by the prime contractor to sign a revised DBE commitment for an agency contract. It can also be generated by selecting **Generate Report** from the **Actions** menu on the Menu Bar.

The report contains general identification information for the contract and prime vendor, summary information about the DBE commitment being signed, and the agency's verification requirement for the prime contractor's signature.

A.2 External Bidder Quoter Entry – External user adding and signing information about bidders and quoters

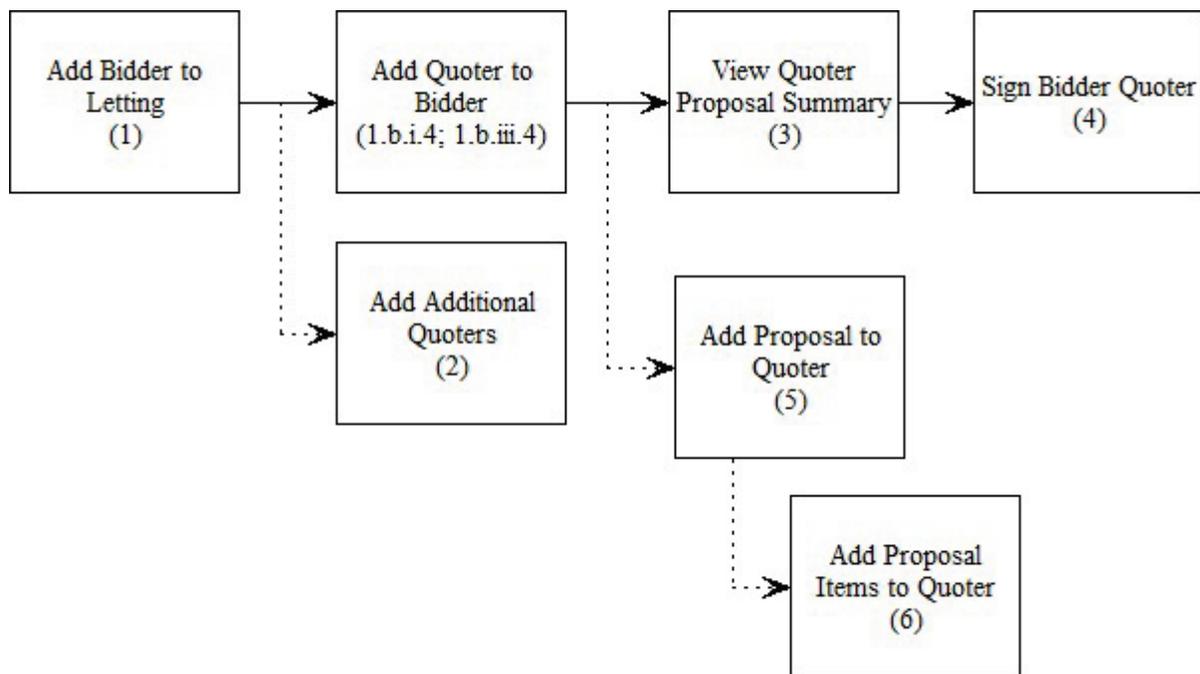


Figure A-1. External Bidder Quoter Entry Workflow

1. Add a bidder to a letting:
 - a. Click the **Bidder Quoter** link from the CRLMS Non-Agency component to open Bid Letting Overview component (see [Selecting the Letting for Bidder/Quoter Information](#)).
 - b. You can add a bidder in one of three ways:
 - i. On the Bid Letting Overview, select **Add** from the **Actions** menu on the component header.
 - 1) The system takes you to the Add Bidder Quoter component (see [Adding a Bidder/Quoter](#)).
 - 2) Select the Letting.
 - 3) Select the Bidder. The Bidder list is filtered to all reference vendors for which the external user has vendor authority.
 - 4) Select the Quoter. The Quoter can be any reference vendor.
 - 5) To add multiple quoters, select **Add** from the **Actions** menu on the Add Bidder Quoter component header.
 - 6) Click the **Save** button to save your changes.

ii. On the Bid Letting Overview, click the number of **Quoters** link on the letting to which you want to add a bidder.

1) On the Bidder/Quoter Summary component, click the **Select Bidders** button (see [Managing Bidder/Quoter Information](#)).

2) In the Select Bidders modal window, the list is filtered to show reference vendors for which the external user has vendor authority. Click the bidders you want to add to the letting.

3) Click the **Add to Letting** button, and then click the **Save** button.

iii. On the Bid Letting Overview, select **Open** from the **Actions** menu on the letting row to which you want to add a bidder.

1) Click the **Select Bidders** button to add one or more bidders to the letting (see [Managing Bidder/Quoter Information](#)).

2) In the Select Bidders modal window, the list is filtered to show reference vendors for which the external user has vendor authority. Click the bidders you want to add to the letting.

3) Click the **Add to Letting** button, and click the **Save** button. The bidder is added in a new row on the Bidder/Quoter Summary.

4) Choose **Select Quoter** from the **Actions** menu on the new bidder row.

5) In the Select Quoters modal window, click the quoters you want to add. The quoter can be any reference vendor.

6) Click the **Add to Bidder** button, and click the **Save** button.

2. Add additional quoters to a bidder:

a. Click the **Bidder Quoter** link from the CRLMS Non-Agency component.

b. On the Bid Letting Overview, select **Open** from the **Actions** menu on the letting row (see [Managing Bidder/Quoter Information](#)).

c. On the Bidder/Quoter Summary, choose **Select Quoter** from the **Actions** menu on the appropriate bidder row.

d. In the Select Quoters modal window, click the quoters you want to add. The quoter can be any reference vendor.

e. Click the **Add to Bidder** button, and click the **Save** button.

3. View the Quoter Proposal Summary:

a. Click the **Bidder Quoter** link from the CRLMS Non-Agency component.

- b. On the Bid Letting Overview, select **Open** from the **Actions** menu on the letting row (see [Managing Bidder/Quoter Information](#)).
 - c. On the Bidder/Quoter Summary, select **View Quoter Proposal** from the **Actions** menu on the appropriate quoter row (see [Maintaining Quoter Information for Proposals in a Letting](#)).
 4. Sign the bidder quoter information:
 - a. Click the **Bidder Quoter** link from the CRLMS Non-Agency component.
 - b. On the Bid Letting Overview page, select **Sign** from the **Actions** menu on the letting row.
 - c. On the Sign Bidder Quoter component, review the Bidder Quoter Report details (see [Signing Bidder/Quoter Information](#)).
 - d. When you are finished reviewing the report, scroll to the bottom of the page to click **Next** button.
 - e. On the next step of the guided process, review the Bidder Verification Report details. When you are finished, scroll to the bottom of the page to click **Next** button.
 - f. Click the **Sign Bidder Quoter** button to sign the bidder/quoter information.
 5. Select proposals to add to a quoter:
 - a. Click the **Bidder Quoter** link from the CRLMS Non-Agency component.
 - b. On the Bid Letting Overview page, select **Open** from the **Actions** menu on the letting row (see [Managing Bidder/Quoter Information](#)).
 - c. On the Bidder/Quoter Summary, select **View Quoter Proposal** from the **Actions** menu on the appropriate quoter row (see [Maintaining Quoter Information for Proposals in a Letting](#)).
 - d. On the Quoter Proposal Summary, click the **Select Proposals** button.
 - e. In the Select Proposal modal window, select the proposals you want to add.
 - f. Click the **Add to Quoter** button to add the selected proposals to the quoter, and click the **Save** button.
 6. Select proposal items:
 - a. Click the **Bidder Quoter** link from the CRLMS Non-Agency component.
 - b. On the Bid Letting Overview page, select **Open** from the **Actions** menu on the letting row (see [Managing Bidder/Quoter Information](#)).

- c. On the Bidder/Quoter Summary, select **View Quoter Proposal** from the **Actions** menu on the appropriate quoter row (see [Maintaining Quoter Information for Proposals in a Letting](#)).
- d. On the Quoter Proposal Summary, identify the proposal from which you want to select items.
- e. Choose **Select Proposal Item** from the **Actions** menu on the proposal row.
- f. In the Select Proposal Items modal window, click the items you want to add.
- g. When you are finished, click the **Add to Quoter Proposal** button.

A.3 External DBE Commitment Entry – External Prime Contractor

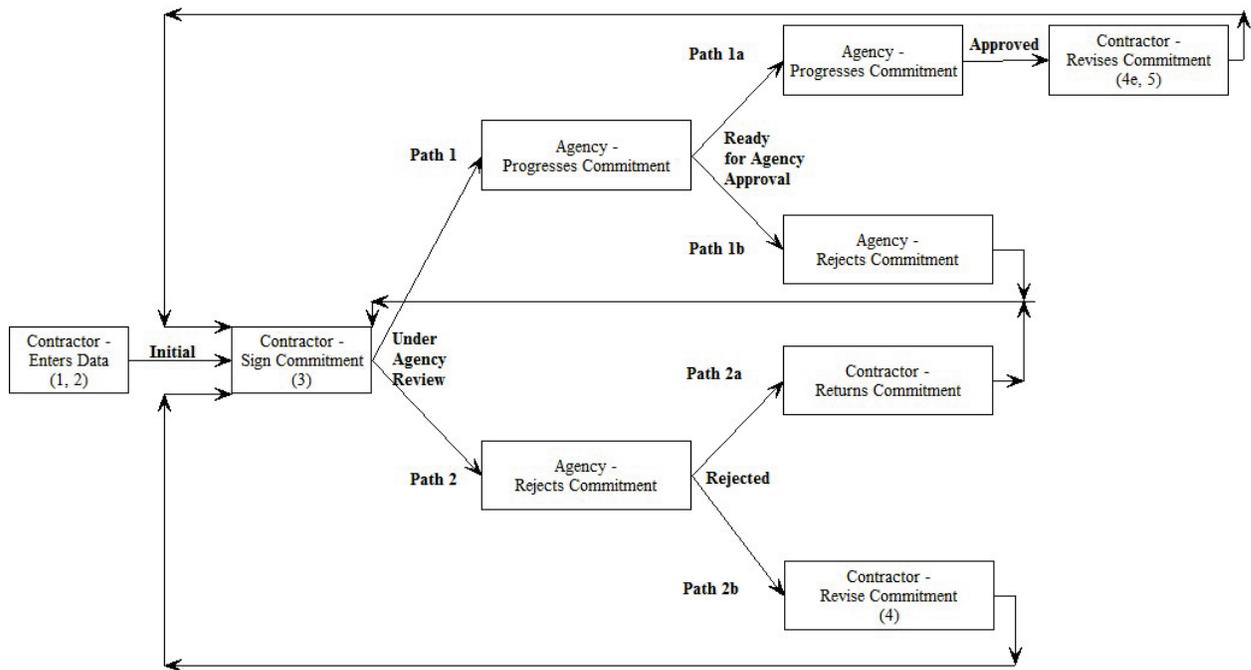


Figure A-2. Prime Contractor External DBE Commitment Entry Workflow

The external prime contractor can perform the following tasks:

1. Add current DBE commitments:
 - a. Click the **Contract Current DBE Commitment** link from the CRLMS Non-Agency component.
 - b. On the Contract Current DBE Commitment Overview component, locate the row for the appropriate contract and prime vendor (see [Managing Current DBE Commitments](#)).

- c. Select **Add DBE Commitment** from the **Actions** menu on the contract row.
 - d. On the Add Contract Current DBE Commitment page, enter information about the new contract DBE commitment as needed (see Adding a Contract DBE Commitment).
2. Maintain contract current DBE commitments:
- a. Click the **Contract Current DBE Commitment** link from the CRLMS Non-Agency component.
 - b. On the Contract Current DBE Commitment Overview component, locate the row for the appropriate contract and prime vendor (see Managing Current DBE Commitments).
 - c. Select **View** from the **Actions** menu on the contract row.
 - d. On the Contract Current DBE Commitment Summary page, update information as needed on the upper and lower components:
 - i. For information about using the upper component, see [Maintaining the Current DBE Commitment](#).
 - ii. For information about using the lower component, see [Managing Contract Current DBE Vendors](#).



Note: Until the Current DBE Commitment is signed, agency users will not be able to view the data.

3. Sign current DBE commitments:
- a. Click the **Contract Current DBE Commitment** link from the CRLMS Non-Agency component.
 - b. On the Contract Current DBE Commitment Overview component, locate the row for the appropriate contract and prime vendor (see Managing Current DBE Commitments).
 - c. Select **View** from the **Actions** menu on the contract row.
 - d. On the Contract Current DBE Commitment Summary page, select **Sign** from the **Actions** menu on the component header.
 - e. The Sign DBE Commitment component displays the first step in a guided process (see [Signing a Contract Current DBE Commitment](#)). Scroll to review the data in the DBE Commitment Verification report.
 - f. Click the **Next** button at the bottom of the page to review the second page in the report.
 - g. Click the **Next** button at the bottom of the page to review the third page in the report.
 - h. To sign the DBE commitment, click the **Sign DBE Commitment** button.

i. The system verifies that the user has proper authority to sign for the prime vendor. The system then stores and displays the user ID and the current date, and attaches the DBE Commitment and Verification reports to the Current DBE Commitment Summary.

4. Revise current DBE commitment:

- a. Click the **Contract Current DBE Commitment** link from the CRLMS Non-Agency component.
- b. On the Contract Current DBE Commitment Overview component, locate the row for the appropriate contract and prime vendor (see [Managing Current DBE Commitments](#)).
- c. Select **View** from the **Actions** menu on the contract row.
- d. Select **Revise** from the **Actions** menu on the component header.
- e. On the Contract Current DBE Commitment Summary page, modify the commitment as needed (see [Revising a Current DBE Commitment](#)).

 **Note:** An authorized user for the prime vendor can modify the record until the record is approved by the agency. Any changes made cause the record to revert to the initial phase and require the record to be signed again.

f. After the Contract Current DBE Commitment has been approved by the agency, the original data is read only. Only the data on the **Revised Commitment** tab can be edited, and additional DBE vendors can be added.

g. After revised data is entered, the record must be signed again (see [Signing a Contract Current DBE Commitment](#)).

 **Note:** The Current DBE Commitment record is copied to the Approved DBE Commitment after the agency approves the Current DBE Commitment record the first time. This captures the originally approved Current DBE Commitment record for future analysis. The Current DBE Commitment record can continue to be revised as needed during the course of the construction phase of the contract.

5. Review approved DBE commitment:

- a. Click the **Contract Approved DBE Commitment** link from the CRLMS Non-Agency component.
- b. On the Approved DBE Commitment Overview component, locate the row for the appropriate contract and prime vendor (see [Managing Approved DBE Commitments](#)).
- c. Select **View** from the **Actions** menu on the contract row.
- d. The Contract Approved DBE Commitment Summary page enables you to view information about the DBE commitment on two components:

- i. For information about using the upper component, see [Viewing the Approved DBE Commitment](#).
- ii. For information about using the lower component, see [Viewing Contract Approved DBE Vendors](#).

 **Note:** Contract Approved DBE Commitment records are read only and cannot be modified.

A.4 External DBE Commitment Entry – External Proposal Vendor

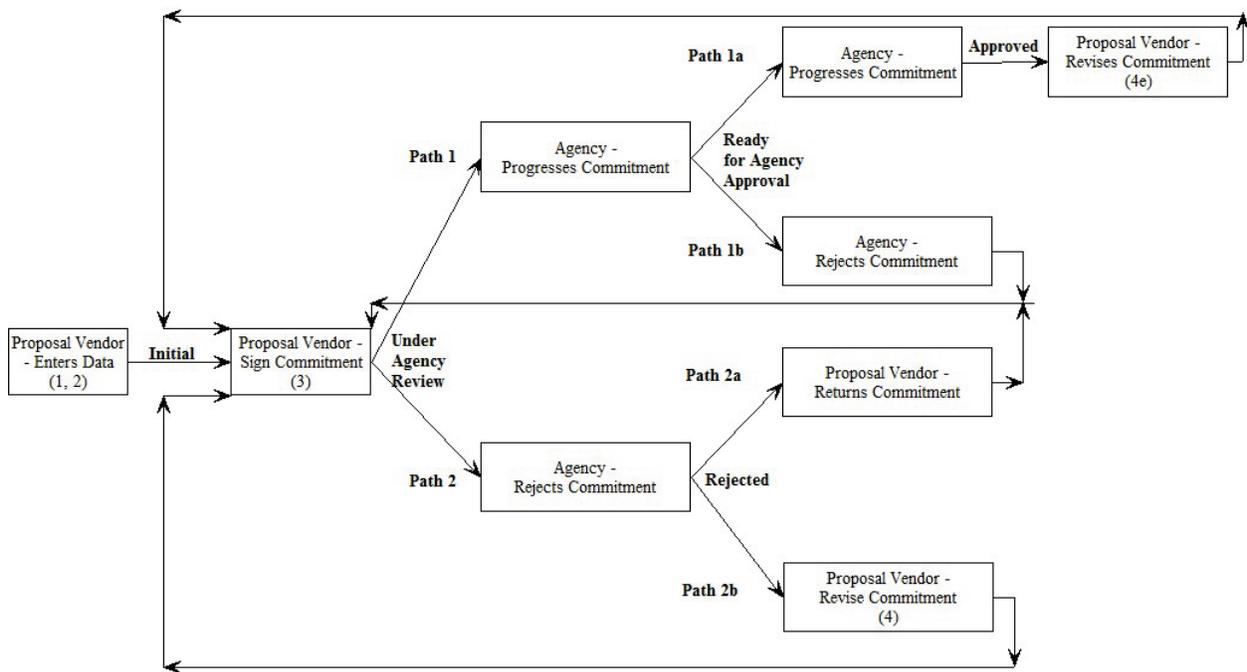


Figure A-3. Proposal Vendor External DBE Commitment Entry Workflow

The external proposal vendor can perform the following tasks:

1. Add DBE commitments:
 - a. Click the **Proposal Vendor DBE Commitment** link from the CRLMS Non-Agency component.
 - b. On the Proposal Vendor DBE Commitment Overview component, locate the row for the appropriate proposal and vendor (see [Managing Proposal Vendor DBE Commitments](#)).
 - c. Select **Add DBE Commitment** from the **Actions** menu on the proposal row.

d. On the Add DBE Commitment component, enter information about the new contract DBE commitment as needed (see [Adding a DBE Commitment to a Proposal Vendor](#)).

2. Maintain DBE commitments:

a. Click the **Proposal Vendor DBE Commitment** link from the CRLMS Non-Agency component.

b. On the Proposal Vendor DBE Commitment Overview component, locate the row for the appropriate proposal and vendor (see [Managing Proposal Vendor DBE Commitments](#)).

c. Select **View** from the **Actions** menu on the proposal row.

d. On the Proposal Vendor DBE Commitment Summary page, update information as needed on the upper and lower components:

i. For information about using the upper component, see [Maintaining a Proposal Vendor DBE Commitment](#).

ii. For information about using the lower component, see [Maintaining DBE Vendor Information](#).

Note: Until the DBE Commitment is signed, agency users are not able to view the data.

3. Sign DBE commitments:

a. Click the **Proposal Vendor DBE Commitment** link from the CRLMS Non-Agency component.

b. On the Proposal Vendor DBE Commitment Overview component, locate the row for the appropriate proposal and vendor (see [Managing Proposal Vendor DBE Commitments](#)).

c. Select **View** from the **Actions** menu on the proposal row.

d. On the Proposal Vendor DBE Commitment Summary page, select **Sign** from the **Actions** menu on the upper component header.

e. The Sign DBE Commitment component displays the first step in a guided process (see [Signing a Proposal Vendor DBE Commitment](#)). Scroll to review the data in the DBE Commitment Verification report.

f. Click the **Next** button at the bottom of the page to review the second page in the report.

g. Click the **Next** button at the bottom of the page to review the third page in the report.

h. To sign the DBE commitment, click the **Sign DBE Commitment** button.

i. The system verifies that the user has proper authority to sign for the proposal vendor. The system then stores and displays the user ID and the current date, and attaches the DBE Commitment and Verification reports to the DBE Commitment Summary.

4. Revise current DBE commitment:

a. Click the **Proposal Vendor DBE Commitment** link from the CRLMS Non-Agency component.

b. On the Proposal Vendor DBE Commitment Overview component, locate the row for the appropriate proposal and vendor (see [Managing Proposal Vendor DBE Commitments](#)).

c. Select **View** from the **Actions** menu on the proposal row.

d. Select **Revise** from the **Actions** menu on the proposal row.

e. On the Proposal Vendor DBE Commitment Summary page, modify the commitment as needed (see [Maintaining a Proposal Vendor DBE Commitment](#)).

Note: An authorized user for the proposal vendor can modify the record until the proposal is awarded or the record is approved by the agency. Any changes made cause the record to revert to the initial phase and require the record to be signed again.

f. After the Proposal Vendor DBE Commitment has been approved by the agency, the original data is read only. Only the data on the **Revised Commitment** tab can be edited, and additional DBE vendors can be added.

g. After revised data is entered, the record must be signed again (see [Signing a Proposal Vendor DBE Commitment](#)).

Note: The DBE Commitment record cannot be edited or revise after the Proposal has been awarded.

A.5 External Payroll Vendor – External user associated with the vendor submitting a payroll

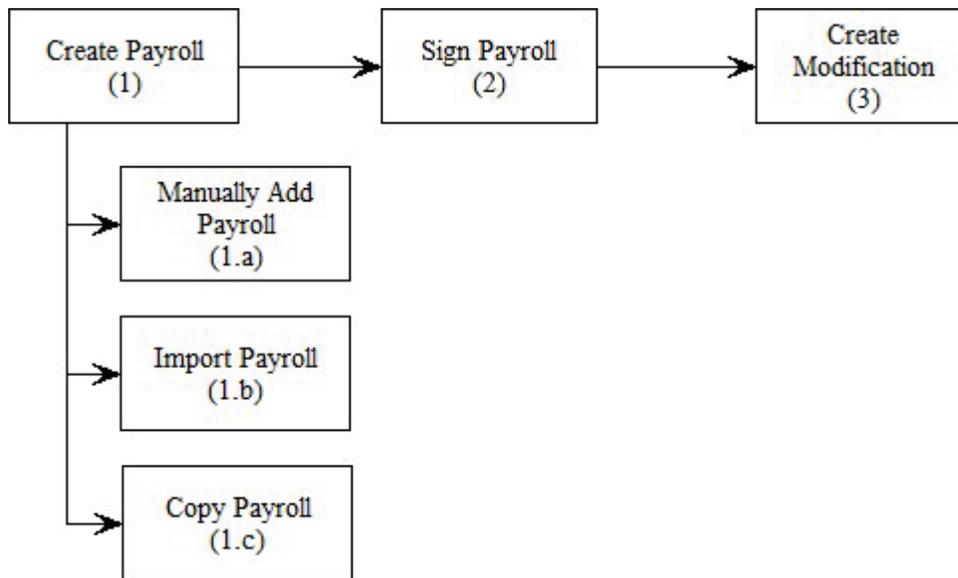


Figure A-4. External Payroll Vendor Workflow

1. Add New Vendor Payroll – Three options

a. Manually Add New Payroll (see [Adding a Contract Payroll](#)):

- i. From the Vendor Payrolls overview component, identify the contract to which you want to add a new payroll (see [Finding Contract Vendor Payrolls](#)).
- ii. Select **Add** from the **Actions** menu on the contract row.
- iii. On the External Certified Payroll component, enter data for the new payroll (see [Adding a Contract Payroll](#)).
- iv. Add employee data and maintain the payroll (see [Maintaining a Payroll Record](#)).
 - 1) Click the [Employee](#) Quick link. The system takes you to the External Payroll Employees page.
 - 2) To add a new employee: Select **Add Employee** from the **Actions** menu on the Employees component.
 - 3) To add a reference employee: Select **Add Ref Employees** from the **Actions** menu on the Employees component.
 - 4) Enter employee data (see [Maintaining Payroll Employees](#)).

- b. Import Payroll in one of four ways (see Importing a Payroll):
 - i. Select **Import File** from the **Actions** menu on the Menu Bar.
 - ii. On the Vendor Payrolls component, select **Import Payroll** from the **Actions** menu on the component header.
 - iii. On the Contact Certified Payroll Overview component, select **Import Payroll** from the **Actions** menu on the component header.
 - iv. On the Contact Certified Payroll Overview component, select **Import Payroll** from the **Actions** menu on a payroll row.
 - c. Copy Payroll (see [Copying a Payroll](#)):
 - i. On the Contract Certified Payroll Overview component, select **Copy** from the **Actions** menu on the desired payroll row.
2. Sign Payroll (see [Signing Contract Vendor Payrolls](#)):
 - a. On the Contract Certified Payroll Overview component, select **Sign Payroll** from the **Actions** menu on the appropriate payroll row.
 3. Create Modification (see [Maintaining a Payroll Record](#)):
 - a. On the Contract Certified Payroll Overview component, select **Create Modification** from the **Actions** menu on the appropriate payroll row.

A.6 External Prime Contractor – External user inputting data related to subcontract payments from the prime contractor

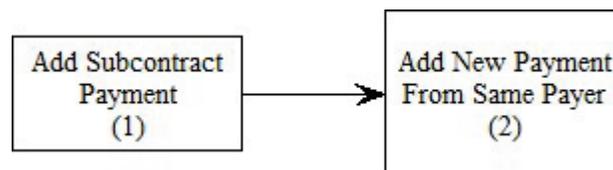


Figure A-5. External Prime Contractor Workflow

1. Add a subcontractor payment in one of two ways (see [Subcontractor Payment Overview](#)):
 - a. From the Contract Overview component:
 - i. Identify the contract associated with the subcontractor payment. Select **View Contract Payments** from the **Actions** menu on the contract row (see [Locating a Contract](#)).

- ii. On the Contract Payment Overview, select **Add Subcontract Payment from Prime** from the **Actions** menu on the appropriate payment row (see [Viewing Agency Contract Payments](#)).
 - iii. On the Add Subcontractor Payment component, enter information about the subcontractor payment (see [Adding a Subcontractor Payment](#)).
 - iv. After you create the new subcontractor payment, you can enter and maintain additional information about it on the Subcontract Payment Summary component (see [Maintaining a Subcontractor Payment Record](#)).
 - b. From the Contract Payment Summary component:
 - i. Click the **Subcontract Payments** tab.
 - ii. Click the **Add Subcontract Payment from Prime** link (see [Viewing Agency Contract Payments](#)).
 - iii. On the Add Subcontractor Payment component, enter information about the subcontractor payment (see [Adding a Subcontractor Payment](#)).
 - iv. After you create the new subcontractor payment, you can enter and maintain additional information about it on the Subcontract Payment Summary component (see [Maintaining a Subcontractor Payment Record](#)).
 2. Add a new subcontractor payment from the same payer:
 - a. On the Contract Payment Summary component, click the **Subcontract Payments** tab.
 - b. Select **Add New Payment Same Payer** from the **Actions** menu on the appropriate payment row.
 - c. Complete the subcontractor payment information under Add Subcontractor Payment (see [Adding a Subcontractor Payment](#)).
 - d. After you create the new subcontractor payment, you can enter and maintain additional information about it on the Subcontract Payment Summary component (see [Maintaining a Subcontractor Payment Record](#)).

A.7 External Subcontractor – External user reviewing and inputting data related to subcontract payments

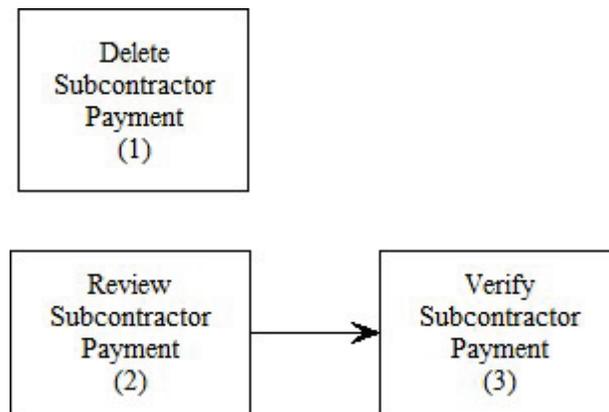


Figure A-6. External Subcontractor Workflow

1. Delete a subcontractor payment:
 - a. From the Contract Overview component:
 - i. Select **View Contract Payments** from the **Actions** menu on the appropriate contract row (see [Locating a Contract](#)).
 - ii. On the Contract Payment Overview component, select **View** from the **Actions** menu on the payment row (see [Viewing Agency Contract Payments](#)).
 - iii. On the Contract Payment Summary component, click the **Subcontract Payments** tab to view the subcontractor payments.
 - iv. Select **Delete** from the **Actions** menu on the subcontractor payment row.
2. Review a subcontractor payment:
 - a. From the Contract Overview component:
 - i. Select **View Contract Payments** from the **Actions** menu on the appropriate contract row (see [Locating a Contract](#)).
 - ii. On the Contract Payment Overview component, select **View** from the **Actions** menu on the payment row (see [Viewing Agency Contract Payments](#)).
 - iii. On the Contract Payment Summary component, click the **Subcontract Payments** tab to view the subcontractor payments.
 - iv. Select **Review Sub Contractor Payment Summary** from the **Actions** menu on the subcontractor payment row (see [Maintaining a Subcontractor Payment Record](#)).

3. Verify a subcontractor payment:
 - a. From Contract Overview
 - i. Select **View Contract Payments** from the **Actions** menu on the appropriate contract row (see [Locating a Contract](#)).
 - ii. On the Contract Payment Overview component, select **View** from the **Actions** menu on the payment row (see [Viewing Agency Contract Payments](#)).
 - iii. On the Contract Payment Summary component, click the **Subcontract Payments** tab to view the subcontractor payments.
 - iv. Select **Verify Payment** from the **Actions** menu on the payment row (see [Verifying Receipt of a Subcontractor Payment](#)).