Scope and Fee System (SAFe)
User Manual
April 2013
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1 About This Document

This document describes how to use the Scope and Fee application. The objectives of the Scope and Fee system, technical requirements, and conventions of this document are available here. Required fields are indicated in the system by asterisks.

1.1 Document Changes

<table>
<thead>
<tr>
<th>Version</th>
<th>Date</th>
<th>Author</th>
<th>Description of Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>0.1</td>
<td>April 2012</td>
<td>Laura Vilensky</td>
<td>Original draft</td>
</tr>
<tr>
<td>0.5</td>
<td>June 2012</td>
<td>Laura Vilensky</td>
<td>Rewrite with system updates</td>
</tr>
<tr>
<td>1.0</td>
<td>July 2012</td>
<td>Laura Vilensky</td>
<td>Rewrite with system updates</td>
</tr>
<tr>
<td>1.5</td>
<td>7/13/12</td>
<td>Laura Vilensky</td>
<td>Rewrite with system updates</td>
</tr>
<tr>
<td>2.0</td>
<td>8/20/12</td>
<td>Laura Vilensky</td>
<td>Updated with comments and prior to enhancements</td>
</tr>
<tr>
<td>2.5</td>
<td>10/16/12</td>
<td>Laura Vilensky</td>
<td>Updated with Phase II enhancements</td>
</tr>
<tr>
<td>3.0</td>
<td>3/29/13</td>
<td>Laura Vilensky</td>
<td>Updated with v.1.2 and v.1.3 release notes</td>
</tr>
<tr>
<td>3.5</td>
<td>4/19/13</td>
<td>Laura Vilensky</td>
<td>Final update for release April 19th</td>
</tr>
</tbody>
</table>

1.2 Document Overview

The primary objectives of the Scope and Fee application are to:

2. Establish a standard and ensure statewide consistency for project management among districts.

3. Serves as an educational tool to improve the skills and understanding of project managers.

4. Focuses project staff and consultants on the project-relevant tasks.

5. Dynamically groups and links information specific to the project, based on the new PDP’s concept of ‘Paths.’ See http://www.dot.state.oh.us/projects/pdp/Pages/Path-Views.aspx for additional information about the paths.

1.3 Technical Requirements

The Scope and Fee system is an Intranet application that uses Internet Explorer 8.0 (or newer) or Mozilla Firefox 14.0 (or newer) on Windows 7.

**Important:** If you have an older version of Firefox, you may receive a message indicating that ‘this connection is Untrusted’ as the connection cannot be confirmed as secure. This is ONLY an issue with older versions of Firefox.

Full instructions for dealing with this message are explained next.

1.3.1 Firefox Version Message

If you receive a ‘This Connection is Untrusted’ message screen, follow these steps:
1. Select the “I Understand the Risks” section of the screen.

2. Click the **Add Exception** button. The **Add Security Exception** screen opens.
   If this button is not available, follow these steps to make the button available to click:
   a. Right-click on the iFRAME.
   b. Select “This Frame.”
   c. Select “Open this Frame in its own tab”. This enables the **Add Exception** button.

3. Confirm the “Permanently store this exception” box is checked.

4. Click the **Confirm Security Exception** button.

The exception has been added to Firefox and you should not have to repeat these steps when you open SAFe in the future.

### 1.4 Audience

Any individuals who will use the Scope and Fee application.

### 1.5 Document Conventions

There are certain conventions used in this document to display different types of information clearly. You can view the explanations of the main conventions utilized here:

#### 1.5.1 Keyboard Keys

When you must type a key on your keyboard, these instructions indicate a keystroke using **boldface type**. For example, press the **Tab** key to move to the next field.
1.5.2 **Bold**
Screen references to things such as buttons or screen names are identified by **boldface** font. For example, press the **Print** button. The Windows **Print** screen opens.

1.5.3 **Links**
There are links to other sections within this document, indicated in blue and underlined. You can click the link to jump to that section of this document. For example, refer to **Navigation** for additional information about navigating the Scope and Fee application.

1.5.4 **Notes and Tips**
In order to draw your attention to certain pieces of information, this information is indicated as a Note or Important.

  **Note:** Notes contain helpful suggestions, references, or useful ancillary information.

  **Important:** Contains significant information about the operation or feature described.
2 How to Use This Document

The overview sections of this document (About This Document, Navigation, and Login and Logout) are for everyone to view as needed. There are specific sections which are useful for specific security roles. So you can read all of the sections of the document but the ones listed here are of specific interest for the security role listed.

<table>
<thead>
<tr>
<th>Security Role</th>
<th>Relevant Sections of This Document</th>
</tr>
</thead>
<tbody>
<tr>
<td>ODOT Admin</td>
<td>5 – Security, 7 – Notifications, 10 – Comments, 11 – Fee Entry, 13 – Approval Workflow, 14 – Lock/Unlock, 16 – Create New Profile, 18 – Administration Only, 19 – States Estimate Model, 20 – Agenda Options</td>
</tr>
<tr>
<td>District Admin</td>
<td>5 – Security, 13 – Approval Workflow, 14 – Lock/Unlock, 16 – Create New Profile, 18 – Administration Only</td>
</tr>
<tr>
<td>Profile Admin</td>
<td>5 – Security, 7 – Notifications, 9 – Tasks, 10 – Comments, 13 – Approval Workflow, 14 – Lock/Unlock, 15 – Profile Wizard, 16 – Create New Profile</td>
</tr>
<tr>
<td>Prime Consultant</td>
<td>5 – Security, 9 – Tasks, 10 – Comments, 11 – Fee Entry, 13 – Approval Workflow, 14 – Lock/Unlock, 15 – Profile Wizard</td>
</tr>
<tr>
<td>Sub-consultant</td>
<td>5 – Security, 9 – Tasks, 10 – Comments, 11 – Fee Entry, 14 – Lock/Unlock, 15 – Profile Wizard</td>
</tr>
<tr>
<td>Reviewer</td>
<td>10 – Comments, 12 – Reviewers and Approvers, 13 – Approval Workflow, 14 – Lock/Unlock</td>
</tr>
<tr>
<td>Workflow Approver</td>
<td>10 – Comments, 12 – Reviewers and Approvers, 13 – Approval Workflow, 14 – Lock/Unlock</td>
</tr>
<tr>
<td>Viewer</td>
<td>3 – Navigation</td>
</tr>
</tbody>
</table>
3  Basic Process

The initial setup of a profile must be completed by a Profile Administrator, ODOT Admin, or District Admin. The administrator can then assign a profile administrator and remove themselves.

Reviewers: Are set to review aspects of a profile and can be assigned at any time.

State’s Estimate Model: Used to compare the consultant costs.

Agenda: Consolidates information from the proposal to write the final proposal to submit to the state.

3.1  Set Details inside Status

Set the following:

Pre-Scope
1. Select the Programmatic
2. Set the Net Fee

Request for LOI
1. Set the Scope to “Request for LOI”
2. Click the Estimate Agreement Number
3. The Profile Admin assigns the Prime Consultant
4. Consultants can now review the profile

Released to Consultant
1. Prime and Sub-consultants enter tasks and fees (units, sheets)
2. Enters roles, rates, overhead

Submitted for Proposal Review
1. Prime consultant sets the profile to this status
2. ODOT can see fees and costs

Acceptance Review (Workflow)
Profile is unlocked and set to Released to Consultant or move to Workflow Process

Executing Agreement
After the final acceptance of the profile is completed through the workflow, the system will automatically set the profile status to Executing Agreement.

Authorized
This status indicates that the contract has been signed.
4 Navigation

The navigation of the Scope and Fee application can change based on whether you are logged in or not. If you are not logged in, you can still view the tasks involved in a profile but you cannot make any comments or edit anything. The differences are noted in each section below.

**Important:** If you are not logging in as an ODOT admin security role, you only can only view the task list of profiles that you are assigned to. When you click on a profile, you will be returned to the Home screen if you are not assigned to the profile.

4.1 Searching

To view a specific list of profiles, you need to enter search criteria. There are different searching options based on whether you’re logged in or not logged in.

4.1.1 Advanced Search

You can always perform a search on the profiles in the system whether or not you’re logged in. When you click **Advanced Search**, additional options to sort and view the list of profiles in the system display. You can press **Enter** or click **Search** to complete a search.

**Not Logged In**

The following options are available for searching profiles for people not logged in:

<table>
<thead>
<tr>
<th>Field</th>
<th>Viewing</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status</td>
<td>Standard</td>
<td>Select from the Request for Letter of Interest (profiles available to submit an interest letter) and Authorized (finalized for work to be completed)</td>
</tr>
<tr>
<td>District</td>
<td>Standard</td>
<td>Select from all Districts, where Central Office = D13</td>
</tr>
<tr>
<td>Programmatic</td>
<td>Standard</td>
<td>Select the date of a program/group of projects from the drop-down list</td>
</tr>
<tr>
<td>PID</td>
<td>Standard</td>
<td>Enter a project ID if you have a specific project you want to look up any information</td>
</tr>
<tr>
<td>C-R-S</td>
<td>Advanced</td>
<td>Enter any part of the County-Route-Section name for a specific profile you want to view (2 character minimum)</td>
</tr>
<tr>
<td>County</td>
<td>Advanced</td>
<td>Select a county from the list. When you perform a search, the results for the County and Route fields are dependent on valid Agreement numbers from CSS. So if a profile doesn’t have a valid Agreement number in CSS and you search on the county of that profile, it will not display in the search. The ALL option does not use the CSS verification.</td>
</tr>
<tr>
<td>Field</td>
<td>Viewing</td>
<td>Description</td>
</tr>
<tr>
<td>------------</td>
<td>-------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Route</td>
<td>Advanced Search</td>
<td>Enter a route number. When you perform a search, the results for the County and Route fields are dependent on valid Agreement numbers from CSS. So if a profile doesn’t have a valid Agreement number in CSS and you search on the route on that profile, it will not display in the search.</td>
</tr>
<tr>
<td>Agreement</td>
<td>Advanced search</td>
<td>Enter an Agreement number if you have a specific agreement you want to view</td>
</tr>
<tr>
<td>Prime Consultant</td>
<td>Advanced search</td>
<td>Enter the company name of a prime consultant to search on the profiles the prime consultant is responsible for</td>
</tr>
</tbody>
</table>

Click **Clear Search** to clear all fields in the search. Click **Search** if you want the system to perform a search on the information you entered.

**Logged In**

The following options are available for searching profiles for people logged in, which are slightly different from the non-logged in options:

<table>
<thead>
<tr>
<th>Field</th>
<th>Viewing</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Show Only My Profiles</td>
<td>Standard search</td>
<td>Defaults to checked – if this box is checked, the system displays only the profiles where you are assigned a role</td>
</tr>
<tr>
<td>Status</td>
<td>Standard search</td>
<td>Select from the complete list of statuses a profile could be set to</td>
</tr>
<tr>
<td>District</td>
<td>Standard search</td>
<td>Select from all Districts, where Central Office = D13</td>
</tr>
<tr>
<td>Progammatic</td>
<td>Standard search</td>
<td>Select the date of a program/group of projects from the drop-down list</td>
</tr>
<tr>
<td>PID</td>
<td>Advanced search</td>
<td>Enter a project ID if you have a specific project you want to look up any information</td>
</tr>
<tr>
<td>C-R-S</td>
<td>Advanced search</td>
<td>Enter the County-Route-Section name for a specific profile you want to view</td>
</tr>
<tr>
<td>County</td>
<td>Advanced Search</td>
<td>Select a county from the list. When you perform a search, the results for the County and Route fields are dependent on valid Agreement numbers from CSS. So if a profile doesn’t have a valid Agreement number in CSS and you search on the county of that profile, it will not display in the search. The ALL option does not use the CSS verification.</td>
</tr>
</tbody>
</table>
### Field Viewing Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Viewing</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Route</td>
<td>Advanced Search</td>
<td>Enter a route number. When you perform a search, the results for the County and Route fields are dependent on valid Agreement numbers from CSS. So if a profile doesn’t have a valid Agreement number in CSS and you search on the route on that profile, it will not display in the search.</td>
</tr>
<tr>
<td>Agreement</td>
<td>Advanced search</td>
<td>Enter an Agreement number if you have a specific agreement you want to view.</td>
</tr>
<tr>
<td>Prime Consultant</td>
<td>Advanced search</td>
<td>Enter the company name of a prime consultant to search on the profiles the prime consultant is responsible for</td>
</tr>
</tbody>
</table>

Click **Clear Search** to clear all fields in the search. Click **Search** or press **Enter** if you want the system to perform a search on the information you entered.

### 4.2 Menu

The information that displays on the menu bar is the first option available in the drop-down menu. Also, when you’re logged in, the heading bar displays your name.

#### 4.2.1 Not Logged In

When you are not logged into the system, you can view the profiles in the system based on the status, district, and programmatic.

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Request for Letter of Interest</td>
<td>Select to view all profiles available for submitting a LOI</td>
</tr>
<tr>
<td>Authorized</td>
<td>Select to view all profiles that have been officially authorized to have the work completed</td>
</tr>
</tbody>
</table>

Select from the list of Districts, where District 13 is the Central Office location. Select the Programmatic from the list of program dates available.

Click **Search** to view the list you selected. Click **Advanced Search** to view the advanced searching options (above).

#### 4.2.2 Logged In, Different View Levels

After you login, the Profiles available to you display. After you open a Profile, there is a task-level view. The high-level menu view includes the filtering and searching options.
4.2.2.1 High-Level View

When you log in, the system automatically displays all of the profiles where you are assigned a role. You can then change the view based on the search parameters you enter.

<table>
<thead>
<tr>
<th>Search Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Filter by My Profiles</td>
<td>Select this checkbox to view only the profiles that relate to the profiles you have set up related to your security role. This is available only to internal ODOT user logins, such as ODOT and profile admins.</td>
</tr>
<tr>
<td>Status</td>
<td>Select the status of the profiles you want to view</td>
</tr>
<tr>
<td>District</td>
<td>Select the location of the profiles you want to view (District 13 = Central Office)</td>
</tr>
<tr>
<td>Programmatic</td>
<td>Select the program date the profile is assigned</td>
</tr>
</tbody>
</table>

4.2.2.2 Profile-Level View

The default view displays all tasks for the profile. Change the view using the View Mode options below.

Menu

The Menu options are:

<table>
<thead>
<tr>
<th>Menu Option</th>
<th>Viewing Level</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home</td>
<td>All</td>
<td>Select to return to the list of profiles</td>
</tr>
<tr>
<td>Create Profile</td>
<td>ODOT Admin and District admin roles only</td>
<td>Select to create a new profile</td>
</tr>
<tr>
<td>Manage Task Template</td>
<td>ODOT Admin and District admin roles only</td>
<td>Select to make edits to the task template that is used to create a profile</td>
</tr>
<tr>
<td>Manage Programmatic</td>
<td>ODOT admin roles only</td>
<td>Select to view the Programmatic Dates screen. You can add new programmatic start dates and confirm that the programmatic is active.</td>
</tr>
<tr>
<td>Menu Option</td>
<td>Viewing Level</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------------------</td>
<td>--------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Manage Planning Ranges</td>
<td>ODOT admin roles only</td>
<td>Select to enter the cost range for certain categories.</td>
</tr>
<tr>
<td>Manage Hourly Rate Ranges</td>
<td>ODOT admin roles only</td>
<td>Select to enter the range for the hourly rate.</td>
</tr>
<tr>
<td>Manage Fee Types</td>
<td>ODOT Admin only</td>
<td>Select to enter the type of fee available and whether it is active.</td>
</tr>
<tr>
<td>Manage Weighted Avg. Overhead Rate</td>
<td>ODOT Admin only</td>
<td>Select to view the average overhead rates for all profiles in the system.</td>
</tr>
<tr>
<td>System Audit Log</td>
<td>All – for profiles assigned only</td>
<td>Select to view the audit log for the system <strong>Only displays when a profile isn’t open</strong></td>
</tr>
<tr>
<td>PDP Manual</td>
<td>All</td>
<td>Select to open the PDP manual</td>
</tr>
<tr>
<td>SAFe User Manual</td>
<td>All</td>
<td>Select to open the user manual</td>
</tr>
<tr>
<td>System Reports</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task Usage Report</td>
<td>ODOT admin roles only</td>
<td>Displays all tasks set to the selected status by the selected date. This report only displays information on system tasks, not user-created tasks.</td>
</tr>
<tr>
<td>Project Profile Wizard</td>
<td>profile open level only</td>
<td>Select to open the profile wizard – see the Profile Wizard section of this document</td>
</tr>
<tr>
<td>Create a Modification</td>
<td>profile open level only, ODOT admin roles only</td>
<td>Select to create a modification to the Profile.</td>
</tr>
<tr>
<td>Delete This Profile</td>
<td>ODOT Admin only</td>
<td>Click to delete the open profile</td>
</tr>
<tr>
<td>Task List</td>
<td>profile open level only, All but Viewer</td>
<td>Select to return to the default task list view from any other task-level screen</td>
</tr>
<tr>
<td>Fee Proposal</td>
<td>profile open level only, All but Viewer</td>
<td>Select to view the cost management options for the profile, such as View Proposed Fees</td>
</tr>
<tr>
<td>Profile Locking/Unlock Request</td>
<td>profile open level only, All but Viewer</td>
<td>Select this option to lock a profile or request that the profile is unlocked – there is an indicator if the profile is locked</td>
</tr>
<tr>
<td>Ownership Assignment</td>
<td>profile open level</td>
<td>Select to view the list of tasks that are assigned to each consultant by company name <strong>Will only display when you are assigned to the profile and when the profile is in the Released to Consultant status</strong></td>
</tr>
<tr>
<td>Assign Reviewers</td>
<td>profile open level only, Prime Consultant role and above only</td>
<td>Select this option to select who will review this profile. After the selections are made, you start the process to activate the reviewing process.</td>
</tr>
<tr>
<td>Menu Option</td>
<td>Viewing Level</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------------</td>
<td>------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Profile Audit Log</td>
<td>profile open level only, Prime Consultant role and above only</td>
<td>Select to view the audit log allowed for the selected security role on the profile – the audit log only displays for the profile selected.</td>
</tr>
<tr>
<td>Analyze Proposal</td>
<td>profile open level only, Profile, District, and ODOT Admins only</td>
<td>Select to open the Analyze Proposal feature. You can select a specific Consultant company's proposal or analyze the entire proposal. Refer to the Analyze Proposal section for additional information.</td>
</tr>
<tr>
<td>States Estimate Model</td>
<td>profile open level only, Profile, District, and ODOT Admins only</td>
<td>Select to open the States Estimate Model feature. Refer to the States Estimate Model section for additional information.</td>
</tr>
<tr>
<td>Agenda</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manage Agreement Parts</td>
<td>profile open level only, Profile, District, and ODOT Admins only</td>
<td>Select to open the Manage Agreement Parts screen where you can set the agenda information related to the agreement. Refer to the Manage Agreement Parts section for additional information.</td>
</tr>
<tr>
<td>Create Agenda</td>
<td>profile open level only, Profile, District, and ODOT Admins only</td>
<td>Select to open the Manage Agreement Parts screen where you can set the agenda information related to parts and tasks. Refer to the Create Agenda section for additional information.</td>
</tr>
<tr>
<td>Print Proposal</td>
<td>All</td>
<td>Select to open the printing screen available, which varies based on login.</td>
</tr>
<tr>
<td>Sign In/Sign Out</td>
<td>All</td>
<td>Select to either log into the system or log out of the system.</td>
</tr>
</tbody>
</table>

**View Mode**

The current view displays and defaults to All Tasks. The View Modes you can select are:

<table>
<thead>
<tr>
<th>View Mode</th>
<th>Viewing Level</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>My Tasks</td>
<td>profile open view level</td>
<td>Select to view only the tasks that have been assigned to you on the Profile. The information available for the Profile will vary based on your security role and tasks assigned in the Profile.</td>
</tr>
<tr>
<td>All Tasks</td>
<td>profile open view level</td>
<td>Select to view all of the tasks on the profile.</td>
</tr>
<tr>
<td>Tasks In Scope</td>
<td>profile open view level</td>
<td>Select to view only the tasks that are “In Scope” for the profile.</td>
</tr>
<tr>
<td>Path Suggested</td>
<td>profile open view level</td>
<td>Select to view the tasks that were marked as YES for the original Path when the Profile was created</td>
</tr>
</tbody>
</table>
### View Mode

<table>
<thead>
<tr>
<th>View Mode</th>
<th>Viewing Level</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task List at Request for LOI</td>
<td>profile open view level</td>
<td></td>
</tr>
<tr>
<td>Assigned Tasks</td>
<td>profile open level only</td>
<td><strong>LPA Assigned:</strong> Select to view only the tasks that have been assigned to the LPA for the profile</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>ODOT Assigned:</strong> Select to view only the tasks that have been assigned to ODOT for the profile (Prime Consultant and admins can view)</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Consultant Assigned:</strong> Select to view only the tasks that have been assigned to the consultant for the profile</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Prime Assigned:</strong> Select to view only the tasks that have been assigned to the prime consultant for the profile</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Sub Assigned:</strong> Select to view only the tasks that have been assigned to the sub-consultant for the profile – you can select the specific sub-consultant to view from the drop-down list</td>
</tr>
</tbody>
</table>

### Export List – Task Level

Use this option when you need to export the task list to an XML document. When you click this option, click **Open** to view the file immediately, click **Save** to select a location where you want to save the file, or click **Cancel** to close the window without creating the file.

### Show Changes – Task List

Changes can be viewed from the Task List or Fee Proposal screens. The changes made to tasks can be shown using these menu options:

<table>
<thead>
<tr>
<th>Change Options</th>
<th>Sub-options</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tasks with Narratives</td>
<td></td>
<td>If any tasks have narratives entered, they are highlighted when you select this option</td>
</tr>
<tr>
<td>Tasks Edited Since LOI</td>
<td></td>
<td>If anyone has edited a task in the profile since the profile was in the Letter of Interest status, they are highlighted when you select this option</td>
</tr>
<tr>
<td>Narratives Added/Edited since Proposal</td>
<td></td>
<td>If any task narratives have been edited since the proposal was submitted, they are highlighted when you select this option</td>
</tr>
<tr>
<td>Task with Comments</td>
<td>Show all Tasks with Comments</td>
<td>If any tasks have comments entered, they are highlighted when you select this option</td>
</tr>
<tr>
<td></td>
<td>Comments made between defined dates</td>
<td>You can select profiles with comments during a date range</td>
</tr>
<tr>
<td>Remove Indicators</td>
<td></td>
<td>Remove any row highlights when you select this option</td>
</tr>
</tbody>
</table>
Show Changes – Fee Proposal

Changes can be viewed from the Task List or Fee Proposal screens. The changes made to fees are displayed using these menu options:

<table>
<thead>
<tr>
<th>Change Options</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Show Tasks with Changed Fees</td>
<td>Select to view any fees or rates have been changed for any tasks since the proposal was previously submitted</td>
</tr>
<tr>
<td>Tasks Edited Since LOI</td>
<td>If anyone has edited the fees in the profile since the profile was in the Letter of Interest status, those fees are highlighted when you select this option</td>
</tr>
<tr>
<td>Show Tasks added since prior proposal</td>
<td>Select to view any tasks added to the profile since the proposal was previously submitted</td>
</tr>
<tr>
<td>Show Narratives edited since prior proposal</td>
<td>Select to view any narratives that were edited since the proposal was previously submitted</td>
</tr>
<tr>
<td>Remove Indicators</td>
<td>Remove any row highlights when you select this option</td>
</tr>
</tbody>
</table>

4.3 Tasks Panel

When you open the application, the system displays the list of available profiles. This information is public record so users do not have to log in to view these profiles and their related task lists. The administrator can select the path of the profile when they create a profile. The list of tasks for the profile populates based on the selected path.

Each task has a [ ] / [✓] checkbox for the properties of the task: In Scope, Consultant, ODOT, LPA, and If Authorized. The related assignments are available in the Team panel in the Profile Explorer, which are discussed below.

**Note:** The SAFe system refers to and uses the If Authorized column in various places. For example, the Fee Entry screen is divided into Authorized Tasks and If Authorized Tasks. You can also filter the Comments screen based on Authorized and If Authorized tasks.

The Previous Scope column shows the tasks that were in previously submitted proposals or different mods of the profile. These checkboxes are grayed out as they are for informational purposes only.

The Original Path column shows the suggested “In Scope” tasks for the profile, based on the path selected. All tasks with the label “Likely” should be reviewed to determine if they should be completed.
4.4 Profile Explorer

There are three panels in the Profile Explorer: Profile Details, Tasks, and Team. Each panel has various options to fill in details about the profile, tasks, and project team. For details on using these panels, refer to the Profile Explorer Panels section below.

Profile Details: This panel gives you space to enter the details about the profile, comments about the profile, and profile security (locking, unlocking, and approval workflows).

Tasks: This panel is where you can view, enter, and search the comments and narratives for each task, perform actions on the tasks (add, move, and so on), and to read any help available on each task. The selected task number displays above the task buttons in this panel.

Team: This panel is where you can deal with security and assigning consultants to specific tasks.

Buttons

– Click this button to open the section
– Click this button to hide the section

4.5 Screen Layouts and Tips

Different areas of the system require different types of navigation because new screens open or different panels open, based on what you are accessing in the system. Here are some rules about navigating the application:

- The name of the screen you are accessing displays in the right end of the heading bar.

- When you select a profile, the task list and Profile Explorer pane display.

- When the task list displays, the panels that display in the Profile Explorer change depending on whether you are logged in.
  - Not Logged In: Profile Details and Tasks display
  - Logged In: Profile Details, Tasks, and Team display

- Pop-up windows open to add more information for Narratives, Cost entry, and the Profile Wizard, for example.

- You can expand or collapse a section of tasks when you click on the arrows on the task heading rows: Expand Collapse.

- When you have an additional window open inside the application, click Close to close the window. Click Cancel in the additional window to delete any data entry before you click Save. You can also close the window when you click on the standard Windows .

- You can return to the default profile view by selecting Menu > Task List. Use the Menu to return to any of the other main screens as well.
# 5 Security

**Related Roles:** Prime Consultant, Sub-Consultant

Security in the Scope and Fee System is based on the security role your login is assigned. Everyone has some viewing rights with the Viewer role before you log into the system but the role associated with your login gives you the level of access from within the application. To request access to the application, view the Access Request section.

## 5.1 Roles in System Explained

The basic information on what a security role can do is described here. The complete list is included in the Role Permissions table in the appendix.

<table>
<thead>
<tr>
<th>Security Role</th>
<th>Who Can Use Role</th>
<th>What Can Role Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>ODOT Admin</td>
<td>Administrator, Central Office (CO)</td>
<td>This role can do everything but cost entry in the system. This is more of a system administrator role.</td>
</tr>
<tr>
<td>District Admin</td>
<td>District Administrator</td>
<td>This is the district administrator with a focus on the tasks lists and without the ability to edit the high-level system information</td>
</tr>
<tr>
<td>Profile Admin</td>
<td>Project Manager</td>
<td>Users with this role have the same permissions as an ODOT administrator without the ability to edit the task list template, override approval/reject, editing roles and rates, creating profiles, and managing system overhead rates</td>
</tr>
<tr>
<td>Prime Consultant</td>
<td>Prime Consultant</td>
<td>Can edit high-level system information related to the profiles they are assigned to, task lists, and sub-consultants, but cannot edit workflows at a high level</td>
</tr>
<tr>
<td>Sub-Consultant</td>
<td>Sub-Consultant</td>
<td>Similar in capabilities to a prime consultant role but without the ability to edit high-level information, lock profiles, and manage prime consultant information</td>
</tr>
<tr>
<td>Reviewer</td>
<td>Anyone assigned to review a profile</td>
<td>Can view task information, upload documents, search for documents, flag tasks, and view cost information</td>
</tr>
<tr>
<td>Workflow Approver</td>
<td>Anyone assigned to approve a profile</td>
<td>Can view task information, upload documents, search for documents, flag tasks, view cost information, and approve/reject a whole profile</td>
</tr>
<tr>
<td>Viewer</td>
<td>Anyone in the public with the address</td>
<td>Can view the main application page, cost information for a profile, task information, files, and print all tasks on a project. This role is available to anyone without logging into the system.</td>
</tr>
</tbody>
</table>
5.2 User Management

User management allows you to give users access to specific profiles at specific levels. For example, an ODOT user may assign a Prime Consultant to a profile, then that Prime Consultant can assign Sub-consultants to that profile. Profiles can be locked an unlocked, which is described in section 11, Lock/Unlock, below.

<table>
<thead>
<tr>
<th>ASM Role</th>
<th>S&amp;F Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>District Admin</td>
<td>District Admin</td>
</tr>
<tr>
<td>ODOT Admin</td>
<td>ODOT Admin, Profile Admin</td>
</tr>
<tr>
<td>User</td>
<td>Prime Consultant, Sub-consultant, Reviewer, Workflow Approver, Viewer</td>
</tr>
</tbody>
</table>

If a user currently has an ODOT Active Directory (AD) account, that user can request the correct security role from the business (currently Consultant Services and Planning, Fall 2012). Current users are assigned a security level using the AD interface, Application Security Manager (ASM). The role levels in ASM correspond to the following Security Roles in the Scope and Fee system:

5.2.1 External User Access

An external user must use the MyODOT website to request access to the application: http://myodot.dot.state.oh.us/. Here are the steps on the MyODOT page:

1. Select the appropriate Click here link on the MyODOT main page.
   a. Select a Primary account if you are creating the first account on behalf of an organization or business. Primary account users can create secondary accounts.
   b. Select a Secondary account if you already have a Primary account and are creating an additional account for your organization or business.
   c. Select a Basic account if you need an individual account, not related to an organization or business.

2. Primary or Basic account: Select an ODOT application you are requesting an account for.
   - Secondary account: Enter the username and password of the Primary account which will be responsible for creating the Secondary account.

3. Click Next. The Account Information screen opens.
   - Click Submit. The Account Information screen opens.
4. Enter the First Name, Last Name, and Email Address for the user of the new account. These are the required fields. All other fields are optional though may be required by the application itself.

5. Enter the two security code words at the end of the page.

6. Click **Next**. The account creation message displays: “Your request for a ____ MyODOT account has been received. Once approved you will receive an email with your login information.”

7. The user will receive a confirmation email from myodot@dot.state.oh.us that the request for a MyODOT account has been received.

An application is not available in the list in Step 2 unless it is configured to support MyODOT. You can update your MyODOT account information and your password from MyODOT.

### 5.2.2 ODOT User Access

Internal ODOT users must fill out the access request form on the ODOT intranet: [http://portal.dot.state.oh.us/Divisions/DoIT/forms/ODOT%20Access%20Request](http://portal.dot.state.oh.us/Divisions/DoIT/forms/ODOT%20Access%20Request)

The business then adds the correct security role to ASM for that user. All users must have the Login security role in ASM as well as the security role.

### 5.3 Audit Log File

#### 5.3.1 Project Profile Audit Log

You access the Project Profile Audit Log only from within a profile. This report displays a list of the changes to a profile.

![Project Profile Audit Log](image)

#### 5.3.2 System Audit Log

You can only access the System Audit Log if you have an ODOT Administrator security role. You access this report from the Home page of the application. This report displays a list of the changes to the system from a high level, not at the individual profile or task level.
You can search by the PID to limit the list to only certain profiles. Otherwise ODOT Admin roles will see all activity in the system. District and Profile admins only see the profiles they are

5.4 Add Sub-consultants

Prime Consultants can manage the prime consultants and sub-consultants for the profile, Sub-consultants can manage the sub-consultants for the profile. Profile administrators (and above) can manage the Prime and Sub-consultants for a profile. See the instructions for adding a new profile in the Create New Profile section below.

Note: A user cannot be in more than one group within a profile. For example, a District Admin cannot be listed as a Prime and Sub-consultant on a profile.

To add a Sub-consultant to a profile, follow these steps:

1. Click the Team tab on the Profile Explorer pane.
2. Click the Sub-Consultants section.
3. Select a sub-consultant company from the drop-down menu. The list of employees already added to this profile display in the section. You can now add a sub-consultant, remove a sub-consultant, or edit/add a sub-consultant company to the list for the profile.

5.4.1 Add Sub-Consultant User

Sub-consultants can add other Sub-consultant users to their organization.

1. On the Profile Explorer > Team > Sub-Consultants section, click to select a Scope and Fee user to add to the profile as a sub-consultant employee. The Select User screen opens.
2. Enter a user last name in the Search by Last Name field.
3. Press Enter. Any search results display in the lower portion of the screen.
4. Select a name on the list.
5. Click OK to add the person to the sub-consultant list for the company. Click Cancel to close the Select User screen without adding a new person.

The added person can now log into the Scope and Fee system and see this profile on their list of profiles.

5.4.2 Remove Sub-Consultant User

1. At least one current employee must display for the selected sub-consultant company. Select the person to remove from the list.
2. Click . A verification screen opens:

3. Click Yes to delete the user. Click No to cancel the deletion.

5.4.3 Manage Sub-Consultant Companies

**WARNING:** If you choose to edit the company in the Scope and Fee system manually, your changes do NOT populate the CSS system. You may create multiple entries for the same company if the information isn’t fixed in the CSS system.

**RECOMMENDATION:** ODOT recommends if you have a company not currently in the Consultant Service System (CSS), please contact the Office of Consultant Services at ODOT to add the new consultant firm to the system.

**Contact (Fall 2012):** Lyle Flower, 614-466-7618, lyle.flower@dot.state.oh.us

**Note:** The Profile Admin or ODOT Admin security role must approve or reject any manually entered sub-consultant companies.
5.4.3.1 Edit Company

Note: You cannot edit CSS-related companies. You can only edit companies manually entered in the SAFe system.

1. Click **Edit/Add** next to the company on the list. The **Manage Sub-consultant Companies** screen opens.

2. Select a company name in the left pane. The company information displays in the right pane.

3. Edit the company information in the right pane as needed.

4. Click **Save** to save your changes. Click **Cancel** to revert to the information prior to the edits.

5. Click **Close** to close the **Manage Sub-consultant Companies** screen.

5.4.3.2 Create New Company

1. Click **New**. The company information fields in the right pane are now editable.

2. Enter the company information.

3. Click **Save** to add the company information to the Scope and Fee system. Click **Cancel** to delete all of the information prior to clicking **Save**.

4. The company is added to the list of companies in the left pane after it is saved but it is NOT approved yet. Follow the steps below to approve the company.

5.4.3.3 Approve New Company

Note: You must have a Profile Admin or ODOT Admin security role to approve a company.

1. Select a company in the left pane with the subtitle: **XYZ Consulting (This Sub is not yet approved)**. The company information populates the right pane.

2. Click the **Approve** button in the right pane. The screen refreshes and the company is now approved – **XYZ Consulting**.

3. Click **Close** to close the **Manage Sub-consultant Companies** screen.
5.5 Add Prime Consultants

To add a Prime Consultant to a profile, you must have a Profile Admin, District Admin, or ODOT Admin security role. See the instructions for adding a new profile in the Create New Profile section below. To add a Prime Consultant to a profile, follow these steps:

**Note:** If the profile has a CSS agreement number associated with it, the Prime Consultant company automatically populates here from the CSS system when the agreement number is assigned from CSS. These instructions are for adding a company manually.

**WARNING:** If you choose to edit the company in the Scope and Fee system manually, your changes do NOT populate the CSS system. You may create multiple entries for the same company if the information isn’t fixed in the CSS system.

**RECOMMENDATION:** ODOT recommends if you have a company not currently in the Consultant Service System (CSS), please contact the Office of Consultant Services at ODOT to add the new consultant firm to the system.

**Contact (Fall 2012):** Lyle Flower, 614-466-7618, lyle.flower@dot.state.oh.us

5.5.1 Create New Company

1. Click the Team tab on the Profile Explorer pane.

2. Click the Prime Consultant section. If a Prime Consultant company has automatically populated, the company cannot be edited – only the employee list can be edited.
3. Click **Edit/Add** to add a Prime Consultant company manually. The **Manage Consultant Companies** screen opens.

4. Enter the company information.

5. Click **Save** to enter this as the Prime Consultant company. Click **Close** to close the screen without entering a Prime Consultant.

6. You can now add and remove a user or edit/add the Prime Consultant company.

### 5.5.2 Add Prime Consultant User

Prime Consultants can add other Prime Consultant users to their organization.

1. Click **Add** to select a Scope and Fee user to add to the profile as a prime consultant employee. The **Select User** screen opens.

2. Enter a user last name in the Search by Last Name field.

3. Press Enter. Any search results display in the lower portion of the screen.

4. Select a name on the list.

5. Click **OK** to add the person to the prime consultant list for the company. Click **Cancel** to close the **Select User** screen without adding a new person.

The added person can now log into the Scope and Fee system and see this profile on their list of profiles.
5.5.3 Remove Prime Consultant User

1. At least one current employee displays for the prime consultant company. Select the person to remove from the list.

2. Click . A verification screen opens:

3. Click Yes to delete the user. Click No to cancel the deletion.

5.5.4 Manage Prime Consultant Company

1. Click Edit/Add next to the company on the list that was added manually. The Manage Consultant Companies screen opens.

2. Edit the information as needed.

3. Click Save to keep the changes to the company. Click Close to discard all changes and close the Manage Consultant Companies screen. The Prime Consultant company displays.

5.6 Add Reviewers to a Profile

When a profile is ready to be reviewed by an ODOT person, you add anyone in the system with a security role of Profile Admin or higher as a reviewer to the profile. To add a Reviewer, follow these steps:

1. The profile must be set to the Status “Submitted for Proposal Review” on the Profile Details pane.

2. Select the Team tab in the Profile Explorer pane.

3. Select the Reviewers section. A blank list opens.

4. Click . The Select User screen opens.
5. Enter a last name in the Search by Last Name field and press Enter.
6. Select name from the results list.
7. Click OK. The name is added to the list of reviewers.
8. Add reviewers to the list.
9. Click Send Notification when the list of reviewers is complete. Refer to the Notifications section below for information on sending notifications.

5.6.1 Delete Reviewers

Select a name from the list and click to delete a reviewer from the list.
6  Sign In and Sign Out

You can view the profiles in the Scope and Fee system without signing in:

<table>
<thead>
<tr>
<th>Status</th>
<th>User Name</th>
<th>Project Name</th>
<th>Request Name</th>
<th>Deadline</th>
<th>Assigned Consultant</th>
<th>Prime Consultant</th>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>RFL</td>
<td>ABC</td>
<td>DEFGH</td>
<td>IJ</td>
<td>05/31/11</td>
<td>750546</td>
<td>1234567</td>
<td></td>
</tr>
</tbody>
</table>

Note: Only profiles in the status Request for Letter of Interest and Authorized can be viewed if you are not logged in.

When you sign in, the list that displays is based on your profile by default. You can change the View Mode, if needed.

Your username displays on the heading bar and the Menu options also change based on your user permissions.

6.1  Sign In

To sign in/login, follow these steps:

1. Click the drop-down menu.

2. Select from the menu. The Login screen opens.
3. Enter your username and password.
4. Click the Login button. The system logs you in with your user permissions level. Click Cancel to close the pop-up window and not sign into the system.

Your username displays on the top menu level on the screen.

### 6.2 Sign Out

To sign out/logout of the application, follow these steps:

1. Click the drop-down menu.
2. Select Sign Out from the menu. The Home screen refreshes and you are no longer logged in. Your username should no longer display on the top menu level on the screen.

### 6.3 Task List Details

When you login to SAFe, the profile list screen that opens includes detailed information about each profile.

<table>
<thead>
<tr>
<th>Heading</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Programmatic</td>
<td>The Programmatic number is listed here if the profile has a programmatic assigned</td>
</tr>
<tr>
<td>District</td>
<td>The location of the profile – what district</td>
</tr>
<tr>
<td>Profile Name</td>
<td>The name of the profile from the Profile Explorer</td>
</tr>
<tr>
<td>Ellis C-R-S</td>
<td>The County-Route-Section name pulled from Ellis</td>
</tr>
<tr>
<td>PID</td>
<td>Project ID, pulled from CSS when the agreement is tied to the profile</td>
</tr>
<tr>
<td>Agreement Number</td>
<td>Number pulled in from CSS when the agreement is tied to the profile</td>
</tr>
<tr>
<td>Status</td>
<td>The status of the profile (refer to Status section for more information on statuses in SAFe)</td>
</tr>
<tr>
<td></td>
<td>Lock displays when the profile is locked – an unlocked profile displays nothing in this column</td>
</tr>
<tr>
<td>Heading</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>✓ / ✗</td>
<td>“Consultant working on disposition of comments” / “Submission under Review” – The Consultant team is creating a response to comments / The ODOT team is reviewing comments Refer to the Comments section for additional information on comments</td>
</tr>
<tr>
<td>Submitted</td>
<td>The number of times a profile has been submitted</td>
</tr>
<tr>
<td>Submit Date</td>
<td>The last submission date</td>
</tr>
<tr>
<td>Role</td>
<td>What is the role of the person logged in on this profile</td>
</tr>
<tr>
<td>Prime Consultant</td>
<td>The name of the prime consultant company for the profile</td>
</tr>
</tbody>
</table>
7 Notifications

The system will automatically notify you of certain changes, depending on what you are doing. Where notifications are available in the system and how they function is described here. Refer to the Assigning Reviewers section below for additional information on using Notifications.

7.1 Notification Rules

Notifications are sent from the assigning reviewer area of the application. The rules that relate to sending out notifications are listed here:

- ODOT and Profile Administrator roles have access to send manual notifications to reviewers.
- You can select specific reviewers to send notifications to or select all reviewers, using the checkboxes.
- Notifications are NOT sent if the reviewer is not selected.
- If you enter a Due Date, it will be included in the email notification sent.
- A URL link is included in the notification, to take the user directly to the profile, so they can perform the work requested after they login.

7.2 Notification List

The following alerts/notifications are sent out in the system:

<table>
<thead>
<tr>
<th>Activation</th>
<th>Notification</th>
<th>A/M</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prime Consultant submits a profile</td>
<td>Profile Admin receives an email</td>
<td>A</td>
</tr>
<tr>
<td>Reviewers are all assigned a task to review on a profile. After all reviewers are assigned, the Profile Admin clicks Send Notification to send of the selected reviewers an email.</td>
<td>Reviewer receives an email</td>
<td>M</td>
</tr>
<tr>
<td>Sub-consultant submits a profile</td>
<td>Prime Consultant receives an email</td>
<td>A</td>
</tr>
<tr>
<td>Workflow – profile is rejected</td>
<td>Profile Admin receives an email</td>
<td>A</td>
</tr>
<tr>
<td>Workflow approval is required</td>
<td>Next approver on list of approvers receives an email</td>
<td>A</td>
</tr>
<tr>
<td>Final approver makes approval of a profile (last person on list)</td>
<td>Profile Admin and Prime Consultant receive an email</td>
<td>A</td>
</tr>
<tr>
<td>Profile Admin unlocks profile</td>
<td>Prime Consultant receives an email</td>
<td>A</td>
</tr>
<tr>
<td>Sub-consultant requests a profile unlock</td>
<td>Prime Consultant receives an email</td>
<td>A</td>
</tr>
<tr>
<td><strong>Activation</strong></td>
<td><strong>Notification</strong></td>
<td><strong>A/M</strong></td>
</tr>
<tr>
<td>---------------</td>
<td>-----------------</td>
<td>--------</td>
</tr>
<tr>
<td>Prime Consultant requests a profile unlock</td>
<td>Profile Admin receives an email</td>
<td>A</td>
</tr>
<tr>
<td>When a task is flagged for review</td>
<td>All Prime Consultants receive an email</td>
<td>A</td>
</tr>
<tr>
<td></td>
<td>Any Sub-consultants assigned to the task will receive an email</td>
<td>A</td>
</tr>
</tbody>
</table>

**A/M:** Automatic/Manual – the system automatically sends out the alert or it must be manually activated
8 Profile Explorer Panels

When you are logged in and viewing the task list, there are three panels available on the Profile Explorer. The use and purpose of each of the panels are described here.

8.1 Profile Details

There are five sections to the Profile Details panel: Profile Details, Profile Locking, Profile Workflow, Profile Attachments, Profile Comments. The details about the profile and its security are available here.

8.1.1 Profile Details

The grayed out information in this section comes directly from Ellis and cannot be changed using this application. You can change the Agreement Number, Profile Name, Profile Description, Programmatic Date (prior to Released to Consultant status), and select the Status of the profile. You then click Save to keep the changes and Cancel to close the window without saving the changes. You can also upload.

8.1.2 Profile Locking

Profile administrators may lock the profile using this panel or the menu option. Consultants may lock the profile for sub-consultants and ODOT may lock the profile for consultants. Instructions for locking and unlocking are available in the Lock/Unlock below.

8.1.3 Profile Workflow

The workflow isn’t available unless the profile is in the Submitted for Proposal Review status. When available, the list of approvers for the profile displays here, along with the date and time they approved the profile.

8.1.4 Profile Attachments

Any documents attached to the profile display here. To attach a new document, follow these steps:

1. Click the Add New Document button. The File Upload screen opens.
2. Enter a description.
3. Click the Choose File to Upload button to select a file. The Choose File to Upload screen opens.
4. Select a file and click Open. The file name populates the File Upload screen.
5. Click Save to add the file to the profile. Click Cancel to quit the window without saving the file.

8.1.5 Profile Comments

Changes to the profile are recorded here, such as locking and unlocking of the profile. You can search the list of changes using the search bar.
To add a comment to the profile, type a comment in the text box then click **Add Comment**. Comments cannot be edited after they are added to the profile. These comments are related to the high level of the profile, not specific tasks. Task-level comments are entered on the Tasks panel.

### 8.2 Tasks

This panel is the default panel that opens when you view the task list. There are three sections to the Tasks panel: Help on this Task, Narrative for this Task, Comments on this Task. The help and commentary on individual tasks are available here.

#### Task Action Options

**Add Task Here:** Click to add a new task above where the cursor is currently positioned. Refer to the **Add Tasks** section below for additional information.

**Duplicate Tasks:** Click to open the task duplication wizard. Refer to the **Duplicate Tasks** section below for additional information.

**Move Task:** Click here to move the currently highlighted task on the task list. The **Preview Re-order Task** screen opens where you can drag and drop any task within the list to any location within the list. Refer to the **Reorder Tasks** section below for additional information.

**Edit this Task:** Click to edit the currently highlighted task on the task list. Refer to the **Edit Tasks** section below for additional information.

**Split Task:** Click to split the work of a task between more than one Prime and Sub-consultant. Refer to the **Splitting Tasks** section below for additional information.

**Delete Tasks:** Click to delete the currently selected task. Only ODOT Admins can delete the whole profile. Refer to the **Delete Tasks** section below for additional information on deleting tasks.

#### 8.2.1 Task Help

When you have a standard task selected, there is text available in this panel about the purpose of this standard task. Any task you or another user adds to the task list will NOT have help information. If there’s a document you want to relate to the task, the **Reference Document** button is available.

#### 8.2.2 Task Narrative

Enter information that should be incorporated into the negotiated legal document. There is limited formatting available and a larger editing box is available when you click the **Pop Out** button. Two prior versions of a Narrative are available, if they exist:

- The current Narrative
- The Narrative from the previous Consultant Proposal, if more than one Proposal has occurred
- The Narrative for a task at the time of Request for Letter of Interest, if one exists
**Buttons**

**Pop Out:** Click to open a larger editing box with more space for editing text. You can add a comment for the task on the pop-up screen as well.

**Print:** Click to print the current narrative. The Windows Print screen opens and you can print the narrative directly.

**Save:** Click to save any changes to the narrative.

**Compare:** Click to compare the narrative at the proposal submission versus the current narrative. The Narrative Comparison screen opens. You can select a color to highlight the differences then click Compare Current to Previous or Compare Current to LOI button to open the Narrative Comparison screen with the relevant text highlighted, from the previous version or Letter of Interest status.

**Revert:** Click to restore the narrative to the text that opened initially, before you save. After you save, this button only works after you make changes and before you save.

### 8.2.3 Task Attachments

Any documents attached to the task display here. You can add documents, delete documents, and view current and previous versions of documents.

**Attach a New Document**

To attach a new document, follow these steps:

1. Save the document you want to upload to a local drive.

2. Click the button on the Task Attachments section. The File Upload screen opens.

3. Click the button to select a file. The Choose File to Upload screen opens.

4. Select a file and click Open. The file name populates the File Upload screen.

5. Enter a description.

6. Check the Fee Attachment box if this document is related to the fees of the profile.

7. Click Save to add the file to the task. Click Cancel to close the screen without saving the file.

**Delete a Document**

If you need to delete a document and all previous versions of the document, follow these steps:

1. Select the attachments list with the document you want to view on it.

2. Click the next to the document. The Remove Document screen opens.
3. Click **Yes** to delete the document. Click **No** to keep the document.

**Open a Document**

If you need to open a current document, follow these steps:

1. Select the attachments list with the document you want to view on it.
2. Click the document link. The **File Download** screen opens.

![File Download Screen](image)

3. Select whether you want to open the file, save the file, or close the screen without viewing or saving the file.

**Open Document Versions**

If you are looking for information in previous versions of a document, follow these steps to open a previous version:

1. Select the attachments list with the document you want to view on it.

![Document List](image)

   **Note:** To have multiple versions, upload the document with the same Description in the **File Upload** screen.

2. Click on the ![icon]. The **Version History** screen opens.
3. Click the ✗ to delete a version of the document. Click the document description link to open the File Download screen.

4. Select whether you want to open the file, save the file, or close the screen without viewing or saving the file.

5. Click Close to close the Version History screen.

8.3 Team

There are six sections on the Team panel:
Each section has a different purpose, all related to assigning security and costs to anyone related to the profile.

8.3.1 **Profile Administrators**
Select a user who should have profile administrator access. Refer to the [Create New Profile](#) section below for additional details.

8.3.2 **Prime Consultant**
If the profile has been assigned an Agreement Number from CSS, the Prime Consultant company should be selected by default. Use this section to add users to the Prime Consultant company. Refer to the [Add Prime Consultants](#) section below for additional details.

8.3.3 **Sub-Consultants**
If the profile has been assigned an Agreement Number from CSS, the list of sub-consultant companies associated with the agreement is available in the drop-down menu. Use this section to add users to the Sub-consultant company available. Refer to the [Add Sub-consultants](#) section below for additional details.

8.3.4 **Reviewers**
Select a user who should have reviewer access. Refer to the [Add Reviewers to a Profile](#) section below for additional details. This is only available to ODOT and Profile Administrators.

8.3.5 **Profile Role Management**
Prime and Sub-consultants set the rates for your companies/organizations for the expected roles on the tasks. You can add more roles, rename current roles, and use the default roles listed in the system. Enter ALL roles on a project that your company will utilize here. Refer to the [Manage Roles and Rates](#) section below for additional details.

8.3.6 **Profile Direct Cost Management**
Select a consultant company name to manage the direct cost in the profile. You can add more direct cost options, rates for each cost, rename current direct costs, and use the default direct costs in the system. Refer to the [Manage Direct Costs](#) section below for additional details.

**Team Buttons**

**Remove:** Click to delete the selected row in the section. A confirmation screen opens and you must click **Yes** to conform the deletion and **No** to cancel it.

**Add:** Click to add a new company or person to a role. The **Select User** screen opens. You can search for a user by name. Click **OK** to confirm the user and **Cancel** to close the screen without adding the user to the role.

<Prime Consultants and Sub-consultants sections only>

**Edit/Add:** Click to select a company to add to either tab. The **Manage Consultant Companies** screen opens. You can add a new company, select a company, and edit company information on this screen.
8.4 Print Center

The print center is used throughout the SAFe system in order to print the profile, tasks, narratives, and comments. Any printing in the system opens this Print Center and printing can be started from Menu > Print Center.

Note: Users who are not logged in can only print the Scope of Services for a profile in Request for LOI status.

8.4.1 Profile

The print center opens to the Profile tab. You can print the profile information based on the selected options.

1. Select a company from the Filter the Proposal.
2. Uncheck the Full Proposal box to make the other options available.
3. Check one of the boxes: Transmittal Letter, Scope of Services, or Fee Proposal. Checking the Full Proposal box grays out the other options.
   
   Note: When you print the Scope of Services, you will only see tasks that are In Scope and Assigned.

4. Click Print. The selected sections print.

8.4.2 Tasks

Select Tasks to print a group of tasks that you select. The list of possible tasks to print comes from the View Mode and the permissions level of your login.
1. Select the level of tasks to print from the radio button list. You can only print one type. When you select Assigned to, the drop-down list is available to select a consultant company’s tasks to print, depending on your security role.

2. Click Print. The selected tasks print.

8.4.3 Narratives

Select the tasks level to export the narratives for the tasks. You do not have to be logged into SAFe to print the narratives for a profile.

1. Select the tasks to view the narratives for.

2. Click Print. A new screen opens with the narratives listed. You can only select one type. When you select Assigned to, the drop-down list is available to select a consultant company’s tasks to print, depending on your security role.
8.4.4 Comments

Click the Comments tab to select the comments related to the tasks to print.

1. Select the tasks to view the comments for. You can only choose one type. When you select Assigned to, the drop-down list is available to select a consultant company’s tasks to print, depending on your security role.

2. Click **Print**. A new screen opens with the comments listed and the Windows **Print** screen opens.
9 Tasks

**Related Roles:** ODOT Admin, Profile Admin, Prime Consultant, Sub-Consultant

Tasks form the main part of the profile and the focus of the system. There are task templates for each Path (1 – 5) that only administrators can edit and are used to create profiles.

9.1 Add Task Here

You can create a task if you have any security role except for Reviewer or Viewer, or if your profile is locked for a profile. Here are some rules for task creation:

**Note:** You cannot add a top level (Phase) or sixth level (lowest level) task.

1. You cannot create a task at the Phase level.
2. When you add a task, no number is added to the task.
3. You can add two levels of sub-tasks underneath of a task you create.
4. You must be logged in to create a task.

To create a task, follow these steps:

1. Click on a Profile Name on the **Home** page. The **Tasks List** screen opens for the selected profile.
2. Select the location of the new task on the list.
3. Confirm the Tasks panel is selected.
4. Click Task Actions > Add Task Here. The **Add Task** screen opens.
5. Select whether to add this task on the same level or the next level down from your selected location.
6. Enter the name for the task.
7. Enter a comment about the purpose of the task.
8. Click **Save** and the task is added to the list. Click **Close** to cancel without adding a task.

### 9.2 Duplicate Tasks

Sub-consultants, Prime Consultants, Profile Admin, and ODOT Admins can duplicate tasks on a profile. You can create duplicate tasks at the 4th level and above if you add headings to create multiple duplicate tasks. You can create duplicate tasks at the 5th level and above if you only duplicate the selected tasks once. To duplicate a task, follow these steps:

1. Select Profile Explorer > Task Actions > Duplicate Tasks. The **Duplicate Tasks** screen opens.

![Duplicate Tasks Screen](image.png)

2. Select at least one task that you wish to duplicate from the task list.
3. Click **Next**. The **Define Header** screen opens.

   **Note:** The **Back** button is available after you click **Next**. You can always go back one screen when you click on it.

4. Select either “Do not create a Header Task” or “Define a Header Task for each duplicate set of tasks”.
   a. If you select “Do not create a Header Task (Makes only one set of duplicate tasks)”, next click the **Next** button. The **Set Location** screen opens.
   b. If you select “Define a Header Task for each duplicate set of tasks,” follow these steps to add multiple sets of tasks:
      1. Click **Add a Header**. A new line opens on the screen.
      2. Type a heading row name.
3. Click **Update** to add a new heading row. Click **Cancel** to close the row without saving any information.

4. Repeat steps 1 – 3 to add another heading.

5. To delete a heading, select the header to delete.

6. Click the **Remove Header** button. A verification screen opens:

   ![Remove Header Task](image)

7. Click **Yes** to delete the header. Click **No** to close the screen and return to the **Define Header** screen.

8. Repeat steps 5 – 7 to delete another heading.

9. Click **Next**. The **Set Location** screen opens.

   ![Duplicate Tasks](image)

5. Select a row. The tasks will be inserted below this task.

6. Click **Next**. The summary screen opens, with a description of the tasks to be inserted.

   ![Summary Screen](image)

7. Click **Finish** to insert the tasks as you selected. Click **Cancel** to close the **Duplicate Tasks** screen without inserting the tasks.

   The tasks are inserted with a ☐ to indicate that a new task has been inserted.
9.3 Move Task

If you need to move a task to another location on the task list, follow these steps:

**Tip:** To move a task past the top or bottom of the screen, close the high-level task groups. You cannot drag-and-drop below the edge of the screen.

1. Click any task on the list of tasks.
2. Click **Task Actions > Move Task** button on the Tasks panel. The **Preview Re-order Task** screen opens.

![Preview Re-order Task screen](image)

3. Select the task to move. Drag the task to the new location, which can be at any level on the task list.
4. Click **Save** to keep the changes to the task list. Click **Close** to close the window without saving the changes.

9.4 Edit this Task

You can only edit tasks that you have added or you have ownership of. Default path tasks are not editable. Follow these steps to edit a task:

1. Select a task to edit from the list of tasks.
2. Click **Task Actions > Edit this Task** button on the Tasks panel. The **Edit Task** screen opens.
3. Edit the task name in the Task Name field.

4. Edit the comments related to the task in the Task Comment field.

5. Click **Save** to keep the changes to the task. Click **Close** to close the screen without saving the changes.

9.5 **Split Task**

If you need to split a task between consultants, prime or sub, you can use the **Split Tasks** button to choose where to split the tasks. Only Prime Consultants can split tasks. Follow these steps to split a task:

1. Select a task to split from the list of tasks.

2. Click the **Task Actions > Split Task** option on the Tasks panel. The **Split Task** screen opens.

   **Note:** If there are no sub-consultants on the profile, tasks cannot be split.

3. All of the consultant companies are automatically selected. Uncheck the companies that should not be included in the split.

4. Click **Create** to split the task. The task list now includes a with sub-tasks underneath it with the same name. The My Task list automatically displays. Click **Cancel** to close the screen without splitting the task.
5. Select View Mode > All Tasks to view the list of tasks. To view who is responsible for these split tasks, select Menu > Ownership Assignment.

When a task is split, each selected company is assigned to one of the newly added sub-tasks. If the task being split has costs associated with it and the owner of the task is assigned ownership of one of the resulting split tasks, the costs will be inherited by the new split tasks.

### 9.6 Delete Tasks

ODOT and Profile Admins, Prime and Sub-Consultants can only delete tasks they own. To delete a task, follow these steps:

1. Open a profile.
1. Select the Tasks tab on the Profile Explorer.
2. Click Task Actions > Delete Tasks. The **Delete Custom Tasks** screen opens.

![Delete Custom Tasks Screen](image)

3. Drag all tasks to delete to the trashcan icon in the left frame.

Click **Clear** to remove all tasks that were dragged to the trashcan before deleting them. Click **Save** to save your changes and delete the tasks dragged to the trashcan. Click **Cancel** to close the screen without saving or clearing or after you save or clear.

### 9.7 Assigning Task Ownership

If you are a Prime Consultant, you can assign ownership of tasks that are assigned in the Consultant or LPA columns. If consultants or LPA are assigned on the Team tab, you can assign those companies/organizations to specific tasks. To assign ownership of a task, follow these steps:

1. Select the tasks to assign to Consultant or LPA.
2. Select Menu > Ownership Assignment. The ownership page displays.
3. Click the radio buttons of the company/organization for each task, as needed. Only one company/organization can be selected per task row.

4. Select Menu > Task List to return to the task list. The changes are automatically saved.
10 Comments

**Related Roles:** ODOT Admin, Profile Admin, Prime Consultant, Sub-Consultant, Reviewer

Comments can be made about a task and comments can flag a task for a resolution when necessary. Comments can be in draft form or “formal” action items. Comments can be accessed any time a profile is open from the Comments Menu option.

You can see which profiles have comments on the initial SAFe profile listing screen. Any profiles with a red dot have a “Consultant working on disposition of comments” (Consultant is reviewing) and profiles with a green dot have a “Submission under review” (ODOT team is reviewing). For additional information on the process of reviewing comments, refer to the [Releasing Action Items](#) section below.

### 10.1 Commenting Rules

- You cannot delete a comment from the Action tab. You can only delete Draft comments. However, you must also delete any comments entered AFTER that comment in the same comment thread in order to delete a comment.
- You can add comments to a phase level task heading or below.
- You can move a comment from the Action tab to the Draft tab until the comments are released/submitted to the responding group, by either a consultant or ODOT team.
- When comments are on the Draft tab, a comment thread can have many responses from the same team members. After a comment is moved to the Action tab, you can still respond to the rest of the comment thread on the Draft tab.
- After the Action comments are responded to and sent to the responding group, comments can no longer be edited or changed.
- The responding group cannot view the draft comments in the originating group’s Draft panel. For example, ODOT has a thread of 10 comments and one is submitted as an Action to the Prime Consultant. Those 9 draft comments remain visible only to the ODOT team on the Draft panel.
- If there is a comment in the Draft panel that does not have an Edit link available, then that comment exists as an Action Item or Action Item Reply. Action Items and their replies are not editable.
- You can only move one comment from each thread from the Draft to the Action panel.
- After a comment thread is finalized, the flag turns green and does not display in the task list.
- When an Action comment submitted to the responding team, that comment can be withdrawn only if the responding team has not started drafting a response.
turns yellow, the Action item cannot be moved to the Draft panel, which removes it from the responding team’s Action panel.

10.2 General Comment Functionality

The general functionality available on the Comments screen, including all buttons and tabs, is described here. More information about the Filter options is available in the Filtering on Task List section below.

10.2.1 Tabs

Task Comments: Default tab that opens. Use this tab to enter comments related to the selected task in the open profile. You can view the Task List, Task Fee Summary, Action, Draft panels from this tab. Task Comments are used as the default instructions, with Profile Comments being the simpler version of the same functionality. Refer to the Task Comments Panels section below for additional information about these panels.

Profile Comments: Use this tab to enter comments related to the open profile.

Comment Help: Use this tab to get additional information on using the Comments functionality.

10.2.2 Buttons

Add Action: Click this button on the Action panel to add the comment you typed into the lower panel to the list of actions.

Add Comment: Click this button on the Draft panel to add the comment you typed into the lower panel to the list of drafts.

Close: Click this button to close the Comments screen. This button is always available on the screen.

Refresh: Click this button to apply the filter selected in the Task List panel.

10.2.3 Flags

A red flag indicates that a comment has been made which requires a response as it is on the Action tab. When you roll the mouse over the flag, the message “Task has been flagged for review” displays.

A yellow flag indicates that a comment has a draft response in process if you are viewing this from the non-responding team. The response is flagged yellow when a response comment is saved on the Draft or Action panel. When you roll the mouse over the flag, the message “Pending Resolution” displays.

A green flag indicates that a comment is complete/accepted – green flags only display if you open the Comments screen for that task. When you roll the mouse over the flag, the message “Flag Resolved” displays.
10.2.4 Task Comments Panels

**Task List:** The list of tasks for the profile display here. Select a task to add a comment to on the Task Comments tab.

**Task Fee Summary:** If the task selected has any fees associated with it, those fees display in this panel. This information cannot be edited here.

**Action/Draft:** These are the panels where the comments are entered and edited.

10.3 Action Link Functions

When you are working on a draft or action comment, there are action links available. Some action links are only available under certain circumstances. All possible action links are described here:

<table>
<thead>
<tr>
<th>Action Link</th>
<th>Description</th>
<th>Rule</th>
</tr>
</thead>
<tbody>
<tr>
<td>Move to Draft</td>
<td>Click to move the action item to the Draft panel</td>
<td>On Action panel</td>
</tr>
<tr>
<td>Move to Action</td>
<td>Click to move the draft comment to the Action panel</td>
<td>On Draft panel</td>
</tr>
<tr>
<td>Reply</td>
<td>Click to respond to a comment</td>
<td></td>
</tr>
<tr>
<td>Draft Reply</td>
<td>Click to respond to a comment, moving the reply to the Draft panel</td>
<td></td>
</tr>
<tr>
<td>Edit</td>
<td>Click to edit a current comment</td>
<td>Only available on the Draft panel, if there are comments already entered, depending on your security level</td>
</tr>
<tr>
<td>Delete</td>
<td>Click to delete the edit or reply you were entering</td>
<td></td>
</tr>
<tr>
<td>Cancel</td>
<td>Available to cancel the action or draft link</td>
<td>Only available when you click another link</td>
</tr>
<tr>
<td>Accept as Resolution</td>
<td>Click to accept the Action response as the resolution to the comment threads</td>
<td>On Action panel when responding to an action item</td>
</tr>
</tbody>
</table>

10.4 Filtering on Task List

You can filter the list of tasks in the Task List panel to view only specific tasks, when you’re using the Task Comments tab. To apply the filter to the Task List, click the **Refresh** button.

<table>
<thead>
<tr>
<th>Filter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Tasks</td>
<td>Displays all tasks in the profile</td>
</tr>
<tr>
<td>Tasks with Action Item</td>
<td>Displays all tasks that have Action item comments entered for them</td>
</tr>
<tr>
<td>My Tasks</td>
<td>Displays only the tasks assigned to the logged in user’s company</td>
</tr>
<tr>
<td>Filter</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Tasks Added Since Prior Proposal</td>
<td>Displays only the tasks added to the profile since the last time to profile was submitted</td>
</tr>
<tr>
<td>Tasks Edited Since LOI</td>
<td>Displays only the tasks that have been edited since the profile was in the status “Request for Letter of Interest (LOI)”</td>
</tr>
<tr>
<td>Tasks in Scope</td>
<td>Displays only the tasks that are in scope for the profile</td>
</tr>
<tr>
<td>Assigned Tasks</td>
<td>Select the assigned tasks for the particular company</td>
</tr>
<tr>
<td>Assigned Tasks (LPA)</td>
<td>Local Planning Authority</td>
</tr>
<tr>
<td>Assigned Tasks (ODOT)</td>
<td>Ohio Department of Transportation</td>
</tr>
<tr>
<td>Assigned Tasks (Consultant)</td>
<td>Consultant company</td>
</tr>
<tr>
<td>Assigned Tasks (Prime)</td>
<td>Prime Consultant</td>
</tr>
<tr>
<td>Sub Assigned</td>
<td>Sub-Consultant company assigned (select from the list)</td>
</tr>
<tr>
<td>Tasks with Narratives</td>
<td>Displays only the tasks with narratives included</td>
</tr>
<tr>
<td>Tasks with New Narratives</td>
<td>Displays the tasks with narratives that have been added since the previous proposal submission. If you select this option when there has been only one proposal submission, nothing will display as all narratives will display in the Tasks with Narratives option instead.</td>
</tr>
<tr>
<td>Tasks with Comments</td>
<td>Displays only the tasks that have comments added to them between the two dates you select</td>
</tr>
<tr>
<td>Tasks with Comments Between Dates</td>
<td>Displays the tasks that have comments added to them between the two dates you select</td>
</tr>
<tr>
<td>Tasks with Changed Fees</td>
<td>Displays the tasks that have changed fees for them since the previous proposal submission</td>
</tr>
<tr>
<td>Authorized Consultant Tasks</td>
<td>Displays consultant tasks that have been authorized (see the Tasks Panel section above for information about authorizing tasks)</td>
</tr>
<tr>
<td>If Authorized Consultant Tasks</td>
<td>Displays consultant tasks that are included in the “If Authorized” section of the Fee Proposal for the profile</td>
</tr>
</tbody>
</table>
10.5 Adding New Comments

This section describes only adding a new comment in either the Task Comments or Profile Comments tab. To add a new comment, follow these steps:

1. Click Menu > Comments. A profile must be open for Comments to be available.
Action Comment
2. (Task Comments tab only) Select the task where you want to add an Action comment. The right panel displays the message “No comments found” if there are currently no comments entered for the task selected.
3. Click in the lower right panel.
4. Type the Action comment in this panel.
5. Click Add Action. The comment is added to the Action panel.
6. If you need to add a comment to a different task, repeat steps 2 – 5 for a different task.

Draft Comment
7. (Task Comments tab only) Select a task where you want to add a Draft comment.
8. Click the Draft panel to add a draft comment to the list.
9. Enter a Draft comment in the lower right panel.
10. Click Add Comment. The comment is added to the Draft panel.
11. If you need to add a comment to a different task, repeat steps 7 – 10 for a different task.
12. Click Close. The Comments screen closes.
10.6 Edit Current Draft Comments

This section only describes the process for editing a Draft comment on the Task Comments or Profile Comments tab. Action comments cannot be edited on the Action panel. Only comments on the Draft panel can be edited. To edit a comment, follow these steps:

1. Click Menu > Comments. A profile must be open for Comments to be available.
2. (Task Comments tab only) Select a task with a comment. Tasks with a red or yellow flag have comments related to them. You can also add a new comment then edit it.
3. Select the Draft panel.
4. Click the Edit link for the comment you want to edit. The edit field opens.
   
   Note: If the Edit link is not available, this comment cannot be edited.

5. Edit the comment text.
6. Click Save Edit. The comment changes are saved. The system displays the name of the user who made the last change and the date/time the last change was made. Click Cancel to discard your changes before you save.

10.7 Responding to Action Items

When an Action item is flagged and sent with the profile (see the Releasing Action Items section for additional information on releasing Action items), users can respond to the Action item. Follow these steps to create a thread of draft comments related to this Action item:

1. Open the profile which has a comment to respond to.
2. Click Menu > Comments. The Comments screen opens.
3. Click on a task in the Task List panel with a 🎨. The comment that requires a response displays in the Action panel.

4. You can either click Reply or Draft Reply, depending on the following:
   - **Reply**: Click to begin creating a response to this comment directly on the Action panel.
   - **Draft Reply**: Click to begin creating a response comment thread on the Draft panel.
5. Enter comments to respond to this Action item. If you have a comment thread on the Draft panel, click Back to Action on the comment response that is the “final” response to the Action item.

6. Prime Consultant submits the proposal using the Profile Wizard (refer to the Profile Wizard > Proposal Submission section for additional information on submitting a proposal).

10.8 Releasing Action Items

When the Consultant company has a comment or response to submit to ODOT, the Prime Consultant must submit the proposal using the Profile Wizard. ODOT reviewers can then view the comment or response.

When the ODOT team has a comment or response to submit to the Consultant company/companies, the profile must be set to the Released to Consultant status. The Prime and Sub-consultant companies can then view the comment or response.

10.8.1 Consultant Companies Process

Refer to the Profile Wizard > Proposal Submission section for information on submitting a proposal. Only a Prime Consultant can submit a proposal so any Sub-consultant comments are not submitted until the Prime Consultant submits the proposal.

10.8.2 ODOT Team Process

After all Action items are “finalized” for Consultant companies to view, the status of the profile must be set to Released to Consultant. If you remove an Action item from the review process (click Move to Draft before a Consultant company begins a response and the flag turns yellow), the Prime Consultant must re-submit the profile and ODOT must set the status to Released to Consultant again before any changes are viewable by the Consultant company.
11 Fee Entry

**Related Roles:** ODOT Admin, Profile Admin, Prime Consultant, Sub-Consultant, Reviewer

Different roles can enter different information based on the status of the profile. This section describes how to enter fee proposal information in the Scope and Fee system.

11.1 Fee Proposal Rules

In order to add and edit fees in a profile, the following conditions must be met:

- Profile is unlocked
- Net Fee is defined by the Profile Admin
- Consultant firms are defined
- Have a status of “Released to Consultant”
- Tasks must be owned by the consultant companies
- Tasks are assigned to consultants
- Users are associated with the consultant companies
- Roles and Rates are defined for each company/organization
- Direct Costs are defined for each company/organization
- Overhead Rates are defined for each company/organization

The following rules relate to what can be seen and edited on the **Fee Proposal** screen:

- Only Tasks that are Phase-level or Step-level are included in the totals
- Only Tasks that are in the scope and consultant-owned are included on the screen
- The Manage menus/buttons are available for Consultant users if the profile status is Released to Consultant and the profile is not locked for the Consultant company. Otherwise the menu/buttons are View only.
- The Manage menus are available when the profile is set to a certain status:

<table>
<thead>
<tr>
<th>Released to Consultant</th>
<th>Manage Cost Details</th>
<th>Manage Fees</th>
<th>Manage Rates</th>
<th>View Cost Details</th>
<th>View Fees</th>
<th>View Rates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consultants</td>
<td>Consultants</td>
<td>Consultants</td>
<td>Consultants</td>
<td>Consultants</td>
<td>Consultants</td>
<td>Consultants</td>
</tr>
<tr>
<td>Submitted for Proposal Review</td>
<td>Consultants, Reviewer, Approver, Profile Admin, ODOT Admin</td>
<td>Consultants, Reviewer, Approver, Profile Admin, ODOT Admin</td>
<td>Consultants, Reviewer, Approver, Profile Admin, ODOT Admin</td>
<td>Consultants, Reviewer, Approver, Profile Admin, ODOT Admin</td>
<td>Consultants, Reviewer, Approver, Profile Admin, ODOT Admin</td>
<td>Consultants, Reviewer, Approver, Profile Admin, ODOT Admin</td>
</tr>
</tbody>
</table>
11.2 Steps to Propose Fees

Prime Consultants and Sub-consultants can set the roles, rates, and direct cost types for a project, then enter the hours for the roles and rates and units for the direct costs.

11.2.1 Fee Proposal Screen

In order to manage fees for a profile, you need to enter information on the Fee Proposal screen. The basic workflow for entering information is described here.

1. Select Menu > Fee Proposal. The current fees entered display on the screen.
Note: The If Authorized tasks have been set to If Authorized either in the Task List or in the Agenda > Agreement Parts.

2. Select a task from the list.

3. Click the Manage Cost Details button to review, edit, or enter cost details for the selected task. Refer to the Manage Cost Details section below for additional information on the Cost Details screen that opens.

4. Select a proposal view from the drop-down menu. The view defaults to the company you are assigned to. Administrators default to the Full Proposal view.

5. Enter the Overhead Rate for your company. Refer to section Manage Overhead Rates for additional information.

6. Select Manage Rates > Manage Labor Costs. The list of roles and their associated rates opens. Refer to the Manage Labor Rates section below for more information on setting the rates for the roles and inserting additional roles.

7. Select Manage Rates > Manage Direct Costs. The list of direct costs and their associated rates opens. Refer to the Manage Direct Cost Rates section below for more information on setting the rates for the direct costs and inserting additional direct costs.

8. Select Manage Fees > Manage Labor Costs to enter the labor hours for the profile. Refer to the Manage Labor Costs section below for more information setting the labor hours for the roles.

9. Select Manage Fees > Manage Direct Costs to enter the cost amounts for the profile. Refer to the Manage Direct Costs section below for more information setting the direct cost amounts.

10. Select a task from the Fee Proposal list. The Manage Cost Details button is now available.

11. Click the Manage Cost Details button. The Cost Details screen opens. Refer to the Manage Labor Costs editing method #2, Cost Details screen section below for additional information on managing cost details.

Buttons

Manage Cost Details: Select a task to make this button available. Click this button to open the Cost Details screen. Refer to the Manage Labor Costs editing method #2, Cost Details screen section below for additional information.

Manage Overhead Rate: Click to enter the overhead rates for the profile. Refer to the Manage Overhead Rates section below for additional information.

Manage Fees: Click to select from the menu options: Manage Labor Costs and Manage Direct Costs. Refer to the Manage Labor Costs and Manage Direct Costs sections below for additional information.

Manage Rates: Click to select from the menu options: Manage Labor Rates and Manage Direct Costs Rates. Refer to the Manage Labor Rates and Manage Direct Costs sections below for additional information.

View Drop-down Menu: Select a proposal view from the drop-down menu. The view defaults to the company you are assigned to. Administrators default to the Full Proposal view.
**Show Changes:** Click to select from the menu options: Show Tasks with Changed Fees, Show Tasks Added Since Prior Proposal, Show Narratives Edited Since Prior Proposal, and Remove Indicators. The following is an example of a message that displays when Show Tasks with Changed Fees is selected:

![Fee Change Tracking](image)

11.3 **Manage Cost Details**

From the Fee Proposal screen, you must select a task then you can manage the cost details for that task when you click the **Manage Cost Details** button or double-click on a specific task. If you are looking at a locked profile, you can only view the cost details but not manage them.

1. The Cost Details tab opens first by default. You can edit information in a box.

![Cost Details](image)

**Buttons**

- **Previous**: Click to move to the previous task on the list. If this button is grayed out, you are viewing the first task on the list.
- **Next**: Click to move to the next task on the list. If this button is grayed out, you are viewing the last task on the list.
- **Close**: Click to close the screen.

11.3.1 **Cost Details**

You can check the box to indicate the task is a rate of pay task and edit the fields that have a box around them, including the Unit fields at the bottom of the screen.
11.3.2 Mods
This tab is available if the current task is In Scope for the current Mod and any previous Mods. This tab is NOT available if this task was not In Scope for a previous Mod. You can view the sum of previous mods in this tab. The current Mod information is on the Cost Details tab.

11.3.3 Narrative
This tab displays the narratives on this task for the selected mod. Click a button for additional functionality.
**Buttons**

**Pop Out Editor**: Click to open the pop-up screen to edit the text in a larger screen, with more options.

**Compare**: Click to open the comparison screen, to compare the current narrative to previous narratives.

-----------------------------

**Pop Out Editor**

You can open this screen to see the narratives on a larger screen, with other options. Enter or edit the text as needed.

**Buttons**

**Add Comment**: Click to open the **Comments for this Narrative** screen, where you can add a comment related to this narrative.

**Print**: Click to print the narratives related to this task.

**Save**: Click to save the changes or new text. The narrative changes may not be saved, depending on the profile status.
Comments for this Narrative Screen

Enter comments relating to this narrative on this screen.

Buttons

Save: Click to save any text you entered on the screen.
Cancel: Click to close the screen.

Narrative Comparison Screen

Use this screen to compare the current narrative versus the narrative when the proposal was last submitted.

Buttons

Compare Current to Previous: Click to view the current narrative to the previous proposal narrative.
Compare Current to LOI: Click to view the current narrative to the profile narrative for this task in the status Released for LOI.
11.3.4 Comments

This tab has the functionality of the Comments screen but specific to this task and its cost details. Refer to the Comments section below for additional information about the system commenting functionality.

**Buttons**

- **Add Action**: Available in the Action panel, this button inserts the text entered in the lower panel in the Action panel.
- **Add Comment**: Available in the Draft panel, this button inserts the text entered in the lower panel of the Draft panel.

11.3.5 Documents

This tab displays all documents uploaded related to this task. You can add more documents as needed.
**Button**

*Add New Document:* Click to open the **File Upload** screen to select a new document to add to the task.

**Buttons**

*Fee Attachment:* Check this box to indicate that document is fee-related.

- Click this icon to browse for a file to upload. After you select the file, the File and Description fields fill in automatically.

*Save:* Click to upload the selected file.

*Cancel:* Click to discard the selected files.

**11.3.6 Ownership**

This tab displays which consultant owns the task you are looking at. You may change the owner by selecting a different consulting company from the list.
11.4 Manage Overhead Rates – Consultants

To change the General or Geotech overhead rate for the profile, select this option. Each Prime and Sub-consulting firm sets the rate for their organization in a profile.

1. Select the profile to edit the rate.
2. Select Menu > Fee Proposal. Cost information already entered in the system displays.
3. Click the Manage OH & COM button. The Manage Overhead Rate screen opens.

4. Select whether you’re editing the General or Geotech overhead rate. The ODOT-entered average rate is indicated next to each type in parentheses.

5. Define the Consultant Overhead Rate and Cost of Money Percentage that will be used to calculate the Consultant Net Fee. These percentages are applied to every task that contains (non-Rate of Pay) Labor Costs.

6. Click Save to keep the changes or Cancel to close the screen without saving.

11.5 Manage Overhead Rates – ODOT Administrator ONLY

If you need to edit the overhead rates for a profile, log in as an ODOT administrator and follow these steps:
**Note:** This rate only changes the rate for any profiles created AFTER the change is made. All previously created profiles are set at the rate that was in place when the profile was created.

1. Select the profile to edit the rate.
2. Select Menu > Manage Overhead Rates. Cost information already entered in the system displays. This is separate from the **Fee Proposal** screen.

![Manage Overhead Rates](image)

3. Edit the Average Overhead Rate and Average Geotech Rate as needed for all profiles from the date you save the rates. These rates will be in effect until the next time you change them, across all profiles entered in the system.
4. Click **Save** to keep the changes or **Cancel** to close the screen without saving.

### 11.6 Manage Fees – Labor and Direct Costs

This drop-down option on the Fee Proposal gives you the option to manage either labor or direct costs by entering hours for labor and units for direct costs. Refer to the Manage Rates section below for additional information about entering direct cost and labor costs.

#### 11.6.1 Manage Labor Costs

Use these instructions to enter the labor roles and rates available for the profile. To enter labor costs, follow these steps:

1. Select Menu > Fee Proposal with a profile open. The list of fees entered in the system displays.
2. Select Manage Fees > Manage Labor Costs. The list of roles and their associated rates opens.

3. To edit the hours for the role, double-click on the hours number. The number is highlighted.
4. Enter the hours or edit the current hours.
5. Press the **Enter** or **Tab** key. The number has a red arrow in the corner (° 25) until you move to another screen and return to this screen, allowing the system to save the changes.
6. Click the **Details** button to view the detailed information about the labor role for this task.
7. Enter information as needed.

8. Click **Save** to keep the options entered. Click **Close** to close the screen after you enter the information and save it.

9. Click **Cost overview** to view the cost management information again.

### 11.6.2 Manage Direct Costs

Use this screen to add the hours for each role that already has a labor rate assigned, for each task. To enter labor costs, follow these steps:

1. Select Menu > Fee Proposal with a profile open. The list of fees entered in the system displays.

2. Select Manage Fees > Manage Direct Costs. The list of direct costs entered in the system displays.
3. Double-click the units of the cost type you want to edit.
4. Edit the units as needed.
5. Press the **Enter** or **Tab** key. The number has a red arrow in the corner (↑25) until you move to another screen and return to this screen, allowing the system to save the changes.
6. Click **Save** to keep the options entered. Click **Close** to close the screen after you enter the information and save it.
7. Click ![Cost overview](image) to view the cost management information again.

### 11.7 Manage Rates

You can edit the labor and direct cost rates from this option, as well as from other options. Select the option to add in the rates that works for you.

#### 11.7.1 Manage Labor Rates

There are two methods for editing the labor costs from the **Fee Proposal** screen. To edit or add labor costs on the profile, select a method as you follow these steps.

#### 11.7.1.1 Manage Labor Rates using Fee Proposal Screen

Use this screen to add the hours for each role that already has a labor rate assigned, for each task.

1. Select Fee Proposal > Manage Rates > Manage Labor Costs. The list of roles and their associated rates opens.
2. To edit a current labor rates, click on the role in the left pane. The current role and hourly rate information displays in the right pane.

3. Edit the information in the right pane.

4. Click **Save** to keep the changes. Click **Cancel** to discard the changes.

5. To enter a new role, click the **New Role** button. The Role and Hourly Rate fields are now blank and available for entry.

6. Enter a role and hourly rate.

7. Click **Save** to keep the changes. Click **Cancel** to discard the changes.

8. Click **Close** to close the screen and return to the **Fee Proposal** screen.

### 11.7.1.2 Manage Labor Rates using Profile Explorer > Profile Role Management

Use this screen to add the labor roles and assign the rates for each role for the profile.

1. Select the profile you need to set the roles and rates on.

2. Select Profile Explorer > Team > Profile Role Management.

3. Select a company from the drop-down list. You can only manage a company you are associated with. The list of current roles and rates then populates the right pane.

4. Click the **Manage** button. The **Manage Roles and Rates** screen opens for the company/organization you selected.
5. To edit a current role and its rate, click on the role in the left pane and the information displays in the right pane. To add a new role and its rate, click New Role and enter the information in the right pane.

6. Click Save every time you finish making a change. Click Cancel Changes to revert to the original information, even after a save. However, after you select a different role you cannot cancel changes.

7. Click Close to close the screen and return to the task list. Only the labor roles that have rates assigned to them display in the Profile Role Management pane.

11.7.2 Manage Direct Costs Rates

Use these instructions to enter the direct rates available for the profile. There are two methods for entering the direct cost rates in the system, using either the Fee Proposal screen or Profile Explorer > Team tab > Profile Direct Cost Management. Only the direct costs assigned display on the Profile Direct Cost Management pane.

Select the method you want to use and follow the instructions below.

11.7.2.1 Manage Direct Costs Rates using Fee Proposal Screen

Use this screen to add the hours for each role that already has a labor rate assigned, for each task.

1. Select Fee Proposal > Manage Rates > Manage Direct Costs. The list of direct costs and their associated cost rates open.

2. To edit a current direct cost, click on the direct cost in the left pane. The direct cost information displays in the right pane.

3. Edit the information in the right pane.

4. Click Save to keep the changes. Click Cancel to discard the changes.

5. To enter a new direct cost, click the New Direct Cost button. The Direct Cost and Cost Rate fields are now blank and available for entry.

6. Enter a direct cost and cost rate.

7. Click Save to keep the changes. Click Cancel to discard the changes.

8. Click Close to close the screen and return to the Fee Proposal screen.
11.7.2.2 Manage Labor Rates using Profile Explorer > Profile Direct Cost Management

Use this screen to add the direct costs and assign the cost rate for each direct cost for the profile.

1. Select the profile you need to set the roles and rates on.
2. Select Profile Explorer > Team > Profile Direct Cost Management.
3. Select a company from the drop-down list. You can only manage a company you are associated with. The list of current roles and rates then populates the right pane.
4. Click the Manage button. The Manage Cost Details Rates screen opens for the company/organization you selected.

5. To edit a current direct cost and its rate, click on the direct cost in the left pane and the information displays in the right pane. To add a new direct and its rate, click New Direct Cost and enter the information in the right pane.

6. Click Save every time you are done making a change. Click Cancel Changes to revert to the original information, even after a save. However, after you select a different direct cost, you cannot cancel changes.

7. Click Close to close the screen.

11.7.3 Subtotals by Role

Use this option to view the subtotals of the labor roles across all tasks. To view the labor roles summary for each consultant company, follow these steps:

1. Select Menu > Fee Proposal.
2. Select a company from the drop-down menu.
4. Click the **Close** button to close the screen and return to the **Fee Proposal** screen.

### 11.7.4 View Direct Costs

Use this option to view the subtotals of the direct costs across all tasks. To view the direct cost summary for each consultant company, follow these steps:

1. Select Menu > Fee Proposal.
2. Select a company from the drop-down menu.
3. Next select Manage Rates > Subtotals by Direct Cost Type. The **Non-Labor Direct Cost Summary** screen opens.

4. Click the **Close** button to close the screen and return to the **Fee Proposal** screen.
12 Reviewers and Approvers

Related Roles: Prime Consultant, Sub-Consultant, Reviewer, Workflow Approvers

Throughout the profile updating process, you can assign a reviewer to look at and make recommendations about the tasks and details about the profile. After a profile is submitted as a proposal, ODOT will review the proposal and approve or reject any part of the proposal, from tasks to attachments.

You can submit a profile to a reviewer to look at the tasks and costs entered prior to the proposal being submitted. Reviewers look at the tasks and enter comments about the profile.

Workflow Approvers have the same permissions as reviewers plus the ability to approve/reject a profile. Approvers are assigned to approve profiles by Profile Admins.

12.1 Assigning Reviewers

You first assign reviewers to a profile, which is described in the Add Reviewers to a Profile section above (in section Security). Then for the specific tasks you assign one or more reviewers using the steps below. When you assign reviewers, you also indicate what reviewers should receive a notification, which is described in further detail in the Notifications section above. To assign a reviewer to a task, follow these steps:

1. Confirm that the correct Reviewers have been assigned to the profile in Team > Reviewers section. Refer to the Add Reviewers to a Profile section above for more information.

2. Select Menu > Assign Reviewers. The Assign Reviewers screen opens.

   Note: The profile must be in the status of “Released to Consultant” or later for the Assign Reviewers functionality to be available.
3. Select the individual tasks a reviewer needs to look at or click the Select All Tasks box at the top of the column to assign all tasks to the reviewer.

4. Choose a Due Date for the review to be completed from the drop-down.

5. Select the name of one or more reviewers to receive a notification of the tasks to be reviewed, if necessary. This is optional.

6. Select the button to send out any notifications. A verification screen opens:

7. Click OK to send the notifications, including a copy to your email address. Click Cancel to end the notification process without sending the notification.

12.2 Assigning Approvers

Approvers are assigned using the Approval Workflow, located in Profile Explorer > Profile Workflow. Refer to the Approval Workflow section below for instructions on assigning approvers running the approving workflow.
13 Approval Workflow

**Related Roles:** ODOT Admin, District Admin, Profile Admin, Reviewer, Workflow Approver

The profile must be in Submitted for Proposal Review status before the approval workflow is implemented. When the approval workflow begins, the application automatically moves the profile to Acceptance Review (Workflow) status. If everyone assigned as an Approver approves the profile or an ODOT Admin override approves the profile, the profile is moved to Executing Agreement status. If any reviewer rejects the profile or an ODOT Admin override rejects the profile, the profile is moved to Rescinded status. After the profile is in the Executing Agreement status the approval workflow is not editable. A list of all statuses is available in the Status section below.

13.1 Workflow Setup

To setup the approval workflow for the profile, follow these steps:

1. On the Profile Explorer panel, in the Profile Details section, set the Status field from “Released to Consultant” to “Submitted for Proposal Review”.
2. Click Save.
3. In the Profile Workflow section, click the Begin Workflow button. Your user name is set as the first approver. You define the setup of the workflow now.
4. Click Add Approver to add approvers to the list. Select a user and click Remove Selected to remove approvers from the list.
5. Click Start to begin the approval workflow process. Click Cancel to stop the approval workflow process. Any defined approvers will be discarded when you click Cancel.

13.2 Approval Workflow

Approvers can be added while the workflow is in process – each new approver is added to the end of the list of approvers. Approvers cannot be deleted from the list while the workflow is in process.

- Click the Approve button to approve the profile. An email is sent to the next approver on the list so they can approve the profile.
  **Note:** After the final approval is done, the status of the profile is automatically set to Executing Agreement.

- Click the Reject button to reject the profile. The Reject Profile screen opens. Check the box to reject the profile, enter any comments, then click Reject. Click Cancel on this screen to stop the rejection and return to the profile.
  **Note:** A rejection stops the profile approval process and the status remains “Submitted to Proposal Review.” Comments are required when you reject the profile and the profile administrator is notified about the rejection.

- If the Workflow has not completed, you may click the Add Approver button to add a new approver to the list.
### 13.3 Status

The statuses available in the system, in the Profile Details section, are listed here. When the status is set to the first status column and saved, the profile has the Available Statuses in the list for the profile.

**Note:** District Admins can only change the status on profiles for which they are assigned.

**Important:** If you need to change a status the the profile is locked, you MUST unlock the profile before you can change the status unless you are a Profile Admin for the profile.

<table>
<thead>
<tr>
<th>Status</th>
<th>Available Statuses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-Scope</td>
<td>Request for Letter of Interest, Direct Selection</td>
</tr>
<tr>
<td>Request for Letter of Interest</td>
<td>Pre-Scope, Released to Consultant, Non-Selection</td>
</tr>
<tr>
<td>Direct Selection</td>
<td>Pre-Scope, Released to Consultant</td>
</tr>
<tr>
<td>Released to Consultant</td>
<td>Request for Letter of Interest, Direct Selection, Submitted to Proposal Review, Rescinded</td>
</tr>
<tr>
<td>Submitted for Proposal Review</td>
<td>Released to Consultant, Acceptance Review (Workflow), Rescinded</td>
</tr>
<tr>
<td>Acceptance Review (Workflow)</td>
<td>Submitted for Proposal Review, Executing Agreement, Rescinded, Released to Consultant</td>
</tr>
<tr>
<td>Executing Agreement</td>
<td>Acceptance Review (Workflow), Authorized, Rescinded</td>
</tr>
<tr>
<td>Authorized</td>
<td>Executing Agreement</td>
</tr>
<tr>
<td>Rescinded</td>
<td>Pre-Scope, Request for Letter of Interest, Released to Consultant, Submitted for Proposal Review, Acceptance Review (Workflow), Executing Agreement</td>
</tr>
<tr>
<td>Non-Selection</td>
<td>Pre-Scope, Request for Letter of Interest</td>
</tr>
</tbody>
</table>

### 13.4 Status Rules

Additional information about how a profile can behave when in a particular status is listed here.

- The Task List for a profile in the Request for Letter of Interest (LOI) status will include all in-scope and ownership assigned tasks that were set up while the profile was in the Pre-Scope status.

- The **Approval Workflow** becomes available when the status of the profile is set to Submitted for Proposal Review.
14 Lock/Unlock

**Related Roles:** ODOT Admin, Profile Admin, Prime Consultant, Sub-Consultant, Reviewer, Workflow Approver

Profiles can be locked to prevent adding tasks, editing tasks, adding narratives, editing narratives, adding costs, editing costs, assigning ownership to tasks, adding documents to a task or the profile, and propose a scope and fee. You can still add Task comments and Profile comments even if your profile is locked.

**Note:** Reviewers and Workflow Approvers can see when a profile is locked.

14.1 Rules

Only the Prime Consultant assigned to a profile can request a profile unlock, completed by a Profile/ODOT Admin. The rules related to this functionality are listed here:

<table>
<thead>
<tr>
<th>Rule</th>
<th>Affects</th>
</tr>
</thead>
<tbody>
<tr>
<td>Profile/ODOT Admin locks/unlocks a profile</td>
<td>Prime Consultant and Sub-Consultant – Sub-consultants cannot request an unlock</td>
</tr>
<tr>
<td>Prime Consultant locks/unlocks a profile</td>
<td>Sub-Consultant (can be a specific company or all companies)</td>
</tr>
<tr>
<td>Sub-Consultant requests a profile unlock</td>
<td>Sub-Consultant and Prime Consultant</td>
</tr>
<tr>
<td>Prime Consultant requests a profile unlock</td>
<td>Profile/ODOT Admin</td>
</tr>
</tbody>
</table>

14.2 Unlock Request – Prime Consultant

Prime Consultants cannot unlock a profile that an Admin or the system has locked. Prime’s can request that the profile is unlocked by an administrator. To request a profile unlock, follow these steps:

1. In the Profile Explorer, click on the Profile Details tab.

   **Note:** Alternatively, you can click on the Menu > Profile Locking. If a profile is locked, that status displays in the profile heading.

2. Click on the Profile Locking panel. The status of the profile is indicated on the locking bar. The message in the Profile Locking panel is “Profile Admins may lock and unlock this profile. Once locked, the Profile will not be editable until it is unlocked. Comments may still be made.”

3. Click the **Unlock Request** button. The **Unlock Request** screen opens.
4. Enter a reason the profile should be unlocked. This is a mandatory field.

5. Click Send Request to submit the request. Click Close to end the request before submitting.

14.3 Unlock Request – Sub-Consultant

Sub-consultants cannot lock a profile but you can request that your profile be unlocked by a Prime Consultant. You can request the profile unlock when a Prime Consultant locks a profile but NOT when a Profile Admin locks a profile. To request a profile unlock, follow these steps:

1. In the Profile Explorer, click on the Profile Details tab.
   
   Note: Alternatively, you can click on the Menu > Profile Locking > Request Unlock. If a profile is locked, that status displays in the profile heading.

2. Click on the Profile Locking panel. The status of the profile is indicated on the locking bar. The message in the Profile Locking panel is “The Prime Consultant has locked this Profile. No edits are permissible at this time. You may still add comments to the Profile.”

3. Select Menu > Unlock Request. The Unlock Request screen opens.

4. Enter a reason the profile should be unlocked.

5. Click Send Request to submit the request. Click Close to end the request before submitting.
14.4 Lock/Unlock Steps – Prime Consultant

Prime Consultants can lock or unlock a profile for the sub-consultant companies on the profile. Prime Consultants can also request that a Profile or ODOT Admin unlock a profile, if the profile is locked for the Prime Consultant. To lock or unlock a profile for a Sub-Consultant, follow these steps:

1. In the Profile Explorer, click on the Profile Details tab.
2. Click on the Profile Locking section. The profile status of the profile displays here.
3. Click the Manage Locks button in the Sub-Consultant Locks section of the Profile Locking panel. The Sub-Consultant Locks screen opens.

![Sub-Consultant Locks screen]

4. The sub-consultants are selected by default. Uncheck all Sub-consultants who should be unlocked.
5. Click Unlock Requests to view the list of unlock requests.

![Unlock Requests screen]

6. Click Close to close this screen. Use the Sub Consultant Locks screen to lock/unlock any sub-consultant companies.
7. Enter the reason to lock or unlock the profile in the right panel. This field is mandatory.
8. Click Save to lock/unlock the profile. Click Cancel to close the screen without saving the changes.
14.5 Unlock Profile – Profile/ODOT Admin

Profile Admin and ODOT Admin security roles can unlock the profile for a Prime and Sub-Consultant. However, these security roles must be at least a Profile Admin role for the profile in order to be able to unlock a profile. To unlock a profile, follow these steps:

1. In the Profile Explorer, click on the Profile Details tab.
2. Click on the Profile Locking section. The profile status of the profile displays here.
3. Click the Profile Locking button. The Unlock Profile screen opens if the profile is locked. The Lock Profile screen opens if the profile isn’t locked.

Unlock Profile Process

4. Click the Unlock Requests button. The Unlock Requests screen opens.
5. Click Close close this screen. Use the Unlock Profile screen to unlock a profile for a Prime or Sub-consultant.
6. Enter a reason to unlock the profile.
7. Click Unlock. The profile is unlocked for Prime and Sub-Consultants. Click Cancel to close the screen without saving the changes.

Lock Profile Process

4. Enter a reason to lock the profile.
5. Click Lock. The profile locks for both Prime and Sub-Consultants. Click Cancel to close the screen without saving the changes.
15 Profile Wizard

Related Roles: Profile Admin, Prime Consultant, Sub-Consultant

Some of the information contained in the final proposal is found in the Profile Wizard. The details entered on the Profile Explorer and Task List are combined with the information entered in the Project Profile Wizard to create the Scope and Fee Proposal. Some information is shared with the Profile Explorer fields, especially on the General Profile Info screen. You may not have the ability to edit certain sections depending on your security role in the Scope and Fee system.

![Profile Wizard Screenshot]

**Note:** Users who are not logged in can view General Profile Information and the documents in the Document Attachments section for profiles in the Request for LOI and Authorized status.

15.1 General Profile Info

This is the section that contains the General Profile Information and is the default opening section for the wizard. You can edit the agreement number by finding it in the Consultant Services System. You may set the following:

1. Net Fee Percentage
2. Scope of Services Meeting Date
3. Price Proposal Due Date

15.2 Profile Details

Enter the details about a profile, including any profile modification information on this interface. Follow these steps to enter the details about a profile:
Check the boxes for the Phases that should be included in this agreement and in a modification, if this is a modification of the agreement. Enter the following:

- **The Duration of the entire agreement, including all modifications to the agreement.** For example, you may simply type “18 months”, or “2 years” or whatever duration language is deemed correct.

- **The Duration of this mod for the project.** For example, you may simply type “18 months”, or “2 years” or whatever duration language is deemed correct.

- **CSS Final Invoice Date** is entered from the CSS system when a project finalization date is entered into CSS

- **Enter the profile description, separate from Ellis project description**

- **The work description is available for the profile admin to add a description of the work performed in the profile.**

### 15.3 Project Location/Project Limits

Enter the locations and limitations on the project, including the units of measure. You can enter the route, route design details, manage limits, and enter a location description for each route.
15.3.1 Routes for this Project

When you add a route, you can then remove or manage the route. Follow these steps to add, manage, and delete a route from the list:

1. Click **Add** to view the route addition drop-down.

2. Enter the route name.

3. Click **Update** to add this route to the list. Click **Cancel** to close the drop-down without adding the new route name.

4. Select a route on the list of routes already entered.
5. Click **Add** to enter an additional route on the list. Click **Remove** to delete the selected list. Click **Details** to view the details of the route (see the next section for entering details to a route).

### 15.3.2 Enter Route Design Details

Follow these steps to add design details to the route, from the **Project Location and Limits** screen:

1. Select a route number from the list.
2. Click **Details** to view the **Route Design Details** screen.

![Route Design Details](image)

3. To enter a new design detail for a design attribute, select the attribute in the left frame.

4. Click **New Designation**. The fields become editable in the right frame.

5. Edit the Specification and Design Attribute fields in the frame frame.

6. Click **Save** to keep the changes. Click **Cancel** to refresh the screen without adding the new route name. Click **Close** to close the screen.

### 15.3.3 Manage Limits

Follow these steps to manage the limits for the project, from the **Project Location and Limits** screen:

![Manage Limits](image)

1. Click **Manage Limits**. The screen with to manage limits opens.
2. Click on a route detail in the left pane and it displays in the right pane for editing.
3. Edit field details as necessary.
4. Click Save to keep the changes and Cancel to refresh the fields and reject the changes.
5. To add a new project limit, click New. The fields are blank in the right frame.
6. Enter the Project Limit, Unit of Measure, and Unit.
7. Click Save to keep the changes and Cancel to refresh the fields and reject the changes.
8. Click Close to close the screen and return to the Project Location and Limits screen.

15.3.4 Project Location Description
You can enter a description for the project location in this screen or edit a current description.
1. Enter your description in the field or edit the description currently entered.
2. Click Pop-out to view a larger text editing screen with the same options.
3. Enter the description information.

4. Click **Save** to keep your changes. Click **Close** to close the pop-up screen and return to the **Project Location and Limits** screen.

### 15.4 Contacts List

Each contact for a company may be entered here for inclusion in the proposal document, including the ODOT contacts for the project. The tabs that display and which contacts you can edit depend on your security role when you log in. If you log in as an ODOT employee, the ODOT Contacts and All Company Contacts tabs display, and you can edit the ODOT Contacts tab.

To add a contact on a tab, follow these steps:

1. Select the correct tab. Some tabs in the screenshot above are only available for certain logins.

2. Click **Add Contact**. The additional contact fields display.
3. Enter the employee details in the fields.

4. Click **Update** to add the contact information to the list. Click **Cancel** to close the contact fields drop-down without saving the contact information.

   **Note:** Click **Remove Contact** to delete the highlighted contact. On the confirmation screen, click **Yes** to delete the contact and **No** to keep the contact on the list.

### 15.5 View Ellis Milestones

The milestones related to the PID display here. Click **Import Milestones** to refresh the data from the Ellis system. This data is READ ONLY and is only the most current information.

### 15.6 Document Attachments

If there are any documents related to this profile at a high level, not at a task level, they are uploaded here. You can upload multiple versions of the same document by entering the same name in the Description field. You can upload fee-related documents, which is indicated by checking a box on the **File Upload** screen.

   **Note:** All documents uploaded for this profile are listed here. If the document is uploaded to a specific task, the Task Number and Task Name display along with the document name.
Buttons

Upload New File: Click this button in the middle of the screen to select a file to attach to this profile.

Pop-out: Click to open the List of Non-Electronic Documents screen. You can enter the documents in a list on this screen. Click Save to keep the list and close the screen. Click Close to discard the list and close the screen.

Save: Click to keep the uploaded files.

Cancel: Click to discard the recently uploaded files. After you click Save, the files cannot be discarded.

Close: Click to close the Project Profile Wizard.

Buttons

Fee Attachment: Check this box to indicate that document is fee-related.

File: Click this icon to browse for a file to upload. After you select the file, the File and Description fields fill in automatically.

Save: Click to upload the selected file.

Cancel: Click to discard the files selected for uploading.
15.6.1 Document Uploading Rules

There are various rules related to uploading documents to the system, based on profile status and user role. These rules are described here.

- **Profile Administrators** cannot delete a document an ODOT Administrator uploads to a profile, though an ODOT Admin can delete a document a Profile Admin uploads.

- Sub-consultants cannot delete a document that a Prime Consultant uploads to a profile, though a Prime Consultant can delete a document a Sub-consultant uploads.

- **Status: Released to Consultant** – ODOT and Profile Admins cannot view any documents uploaded by the Prime and Sub-consultants in this status.

- **Status: Submitted for Proposal Review** – Documents uploaded by Prime and Sub-consultants are visible while the profile is in this status. Sub-consultants and Prime consultants cannot delete any files they upload. ODOT and Profile Admins cannot delete these documents either.

- **Status: Released to Consultant (returned to this status for editing)** – ODOT and Profile Admins cannot view any documents uploaded by the Prime and Sub-consultants while returned to this status.

- **Status: Request for Letter of Interest and Authorized** – Viewers can access document attachments and only through the Profile Explorer > Tasks > Task Attachments section of the profile.

15.7 Exceptions and/or Clarifications

You can enter any exceptions related to the profile here, as well as clarifications for the profile.

**Buttons**

**Pop-out:** Click to open a larger editing box with more space for editing text.
15.8 Proposal Submission

Prior to submitting the proposal, a principal consultant (for each consulting firm) must fill in the required fields to sign the proposal electronically. You can click **Print Proposal** to print the current proposal in the ODOT template form. All relevant sub-consultants should sign the proposal prior to the Prime Consultant signing the proposal.

**Note:** Printed Proposals are locked in Word format. Users who are not ODOT administrators cannot edit the output file.

To sign the proposal, follow these steps:
1. Enter the information in the Consultant Principal Full Name, Consultant Principal Title, and Phone Number.

2. Click Electronically Sign This Proposal. The **Profile Details Editor** screen opens.

![Profile Details Editor](image)

3. Enter your username and ODOT domain password for the system.

4. Click **Electronically Sign This Proposal** to submit your electronic signature. Click **Cancel** to cancel your signature.

### 15.8.1 Print Proposal

If you want to print the proposal to pdf, click the **Print Proposal** button. This opens the Print Center, which is described in the **Print Center section** above.
16 Create New Profile

**Related Roles:** District Admin, ODOT Admin

When a new construction project is created, it creates a need for a profile in the Scope and Fee system. This profile will go through the workflow as needed but it must first be created. To create a new profile, follow these steps:

1. Select Menu > Create Profile. The **Profile Search** screen opens.
2. Enter a project number (PID) available in Ellis.
3. Click **Search**. The search results display in the lower part of the screen. More than one PID may display.

4. Click the **Create Project Profile** button on the row of the profile you want to create. A **Create Project Profile** verification screen opens.
   
   **Important:** You can also open a profile that already exists. Click **View Profile** to open a currently existing profile instead of creating a new profile. You may still continue with creating a new profile with the same PID.

5. Click **Yes** to create the new profile and **No** to cancel the profile creation. The screen refreshes with the basic information about the profile.

6. You can now edit the Profile Name*, Initial Status*, select an initial path (1-5), select a programmatic date, and upload a project initiation package, if it’s available. Use the **Clear** buttons if you select something and need to return to a blank selection.  
   *
   = required fields

7. If you have a file to upload to initiate the project request, click **Upload Project Initiation Package**. The **File Upload** screen opens.
8. Click 

9. Enter a description for the file. The description defaults to the file location and name you select.

10. Click **Save** to add the file. Click **Cancel** to stop the file upload without uploading the file. The file is available for viewing using the Profile Wizard or Profile Explorer > Profile Details section of the profile.

11. After you’ve entered all of the basic profile information, click **Save** to finish creating the profile. Click **Cancel** to stop the creation of the profile and return to the **Search** screen.

12. The profile screen opens. This is populated with tasks ONLY if you selected a path for the project. If no path is selected, there are no tasks listed. You can select a path in the Profile Explorer > Profile Details section (refer to the Profile Explorer above). Enter profile information and select tasks for companies as needed.

### 16.1 Establish Agreement

To establish an agreement for the profile, the status must be set to Request for Letter of Interest. Follow these steps:

1. On the Profile Explorer > Profile Details section, click **Establish Agreement**. The Set an Agreement interface opens.

2. Click on an agreement number button if there are one or more in the displayed list. You can also click the **Custom Agreement** button. A confirmation screen opens:
**Recommendation:** Creating a custom agreement number is not a recommended process. ODOT recommends that you contact the Office of Consultant Services to create an agreement number if one does not already exist.

**Consult (Fall 2012):** Lyle Flower, 614-466-7618, lyle.flower@dot.state.oh.us

Click **Yes** to create a custom agreement and **No** to use CSS to manage the profile. If you use a custom agreement, you will not be able to use CSS to add Prime Consultants and Sub-consultants to the profile.

**YES** – if you selected Yes, you can enter an Agreement Number in the Profile Details. You must enter all companies (Prime and Sub-Consultants) manually on the Profile Explorer > Team section. Refer to the [Add Sub-Consultants](#) and [Add Prime Consultant](#) sections (4.4 and 4.5) above.

**NO** – if you selected No, the agreement number automatically populates the Agreement Number field in the Profile Details.

**Note:** If you select Yes by mistake, you can close the profile before you save changes.
17 Profile Modifications

Related Roles: ODOT Admin and Profile Admin

When a profile is modified (called a mod), it is given an altered Agreement number. So the 3\textsuperscript{rd} mod of Agreement 12345 would be called 12345-3. A mod can only be created in the profile if the profile has an Agreement number.

17.1 Create a Profile Mod

To create a profile mod, follow these steps:

1. Log into the SAFe system using an ODOT or Profile admin role.
2. Click the profile you want to create a mod for. The profile task list opens.
3. Select Menu > Create a Modification. The Create Modification screen opens.

4. Click Create Mod to finish creating the mod for the PID. The Create Mod verification screen opens. Click Close to cancel the mod creation process.

5. Click OK. The Mod is now available in the list of profiles. The profile is automatically set to the Pre-scope status.

The previous In Scope tasks that were not assigned will be set to Consultant Owned in the profile mod. All team information, roles, rates, and narratives are carried over from the initial profile. No comments are carried over from the initial profile.
18 Administration Only

**Related Roles:** ODOT Admin and Profile Admin (some parts)

Profile Administrators will usually create a profile, assign the people to the profile, then have little interaction with the profile unless requested by the prime or sub-consultants. The Prime Consultants will do the majority of the updating of the profile prior to submittal.

ODOT and Profile administrators can manage the task template and the programmatic. Login as an ODOT security role and select these options from the Menu drop-down while using the application.

18.1 Comments

There is a special function available only to the ODOT Administrator role on the **Comments** screen. When you are on the **Comments** screen and you select a task with a flag on it, the comments for that task display in the Action panel. Double-click on the flag icon and the following option displays:

![Image](image-url)

Click **Remove Action Items** to remove all action items and responses for the selected comments thread. Double-click the flag icon to hide this option. ONLY the ODOT administrator role can perform this function.

18.2 Task Template

To manage the task template, follow these steps:

1. Click Menu > Manage Task Template. The **Manage Task Template** screen opens.
2. Select a task and click **Edit Selected** to edit the task. The **New Task Template** screen opens.

   ![New Task Template Screen](image)

   a. You can edit the task information on this screen.

   b. If you include an information link, click the **Test Link** button to confirm that the link works properly. (This feature has been designed to support future functionality)

   c. Click **Save** to keep the changes. Click **Close** to close the screen without saving changes or after you save the changes.

3. Select a task and click **Add Task** to add a new task. The **New Task Template** screen opens with no information on it.
a. Define the new task information on this screen.

b. Click **Save** to keep the changes. Click **Close** to close the screen without saving changes or after you save the changes.

4. Select a task and click **Move Task** to move tasks on the list. The **New Task Template** screen opens with no information on it.

   a. Click on and drag a task to the new location.

   b. Click **Save** to keep the changes. Click **Close** to close the screen without saving changes.

5. To return to the list of profiles, click Menu > Home. Select any option from the Menu to move to another area of the application.
18.3 Programmatic

To manage the programmatic, follow these steps:

1. Click Menu > Manage Programmatic. The Programmatic Dates screen opens.

   ![Programmatic Dates Screen]

18.3.1 Edit Current Programmatic

2. Double-click on a current programmatic date to view it in the right pane for editing.
3. Edit the Programmatic Date and check the Is Date Active box if the programmatic is active.
4. Click Save to keep the changes. Click Cancel to close the screen without saving changes.
5. Click Close to close the screen.

18.3.2 Create New Programmatic

2. Click New to create a new programmatic. The programmatic fields in the right pane are editable.
3. Enter the Programmatic Date and check the Is Date Active box if the programmatic is active.
4. Click Save to keep the changes. Click Cancel to close the screen without saving changes.
5. Click Close to close the screen.

18.4 Manage Planning Ranges

ODOT Administrators can specify the range of costs for planning categories, related to the Cost Analysis functionality. To specify the ranges, follow these steps:

1. Login as an ODOT Admin role.
2. Select Menu > Manage Planning Ranges. The Manage Planning Ranges screen opens.
Edit Category and Range
3. Select the category in the left pane to edit. The information displays in the right pane.
4. Edit the Category and Category Range as needed.
5. Click **Save** to keep the changes. Click **Cancel** to discard changes prior to saving.
6. Click **Close** to close the Manage Planning Ranges screen.

New Category and Range
7. Click the **New** button. The Category and Category Range fields are available for entering information in the right pane.
8. Enter the category and cost range for the system in the right pane.
9. Click **Save** to keep the changes. Click **Cancel** to discard changes prior to saving.
10. Click **Close** to close the Manage Planning Ranges screen.

Delete Category and Range
11. Select the Category in the left pane to delete. The **Remove** button is now available.
12. Click the **Remove** button. A verification screen displays the message: “Are you sure you want to remove that ‘Planning Range’?”
13. Click **Yes** to confirm the deletion. Click **No** to cancel the deletion.
14. Click **Close** to close the Manage Planning Ranges screen.

18.5 Manage Hourly Rate Changes
ODOT Administrators can specify the range of costs that can be entered for specific rates in the system, related to the Cost Analysis functionality. To specify the ranges, follow these steps:
1. Login as an ODOT Admin role.
2. Select Menu > Manage Hourly Rate Ranges. The Manage Hourly Rate Ranges screen opens.
Edit Category and Range

3. Select the rate description in the left pane to edit. The information displays in the right pane.
4. Edit the Rate Description and Hourly Rate Range as needed.
5. Click Save to keep the changes. Click Cancel to discard changes prior to saving.
6. Click Close to close the Manage Hourly Rate Ranges screen.

New Category and Range

3. Click the New button. The Rate Description and Hourly Rate Range fields are available for entering information in the right pane.
4. Enter the rate and hourly rate range for the system in the right pane.
5. Click Save to keep the changes. Click Cancel to discard changes prior to saving.
6. Click Close to close the Manage Hourly Rate Ranges screen.

Delete Category and Range

3. Select the rate description in the left pane to delete. The Remove button is now available.
4. Click the Remove button. A verification screen displays the message: “Are you sure you want to remove that ‘Hourly Rate Range’?”
5. Click Yes to confirm the deletion. Click No to cancel the deletion.
6. Click Close to close the Manage Hourly Rate Ranges screen.

18.6 Manage Overhead Rates (for a profile)

If you need to edit the overhead rates for a profile, log in as an ODOT administrator and follow these steps:

    Note: This rate only changes the rate for any profiles created AFTER the change is made. All previously created profiles are set at the rate that was in place when the profile was created.

1. Select the profile to edit the rate.
2. Select Menu > Fee Proposal. Any cost information already entered in the system displays.
3. Click Manage Overhead Rate button. The Manage Overhead Rate screen opens.

4. Edit the Average Overhead Rate or Average Geotech Rate as needed for the profile.

5. Click **Save** to keep the changes or **Cancel** to close the screen without saving.

### 18.7 Deleting Profiles

Only ODOT Administrator roles can delete a profile. To delete a profile, select Menu > Delete This Profile with the profile to be deleted open. You cannot delete profiles in the Authorized status. You can delete profiles in any other status.

### 18.8 System Audit Log

The system audit log is available from the menu for the non-profile specific edits to the system. System changes only display related to profiles that you are assigned to. For more details on the system audit log, refer to the Security > Audit Log File > **System Audit Log** section above.

### 18.9 System Reports

Currently (Fall 2012), there is only the Task Usage report available. Other reports will become available as development progresses.
18.9.1 Task Usage Report
There is a report available to display how often a default task (not a newly created task) is used across all profiles in the system. All tasks set to a certain status by a certain date can be reported on. ODOT administrators can see how frequently a task is being used. To access and use this report, follow these steps:


2. Select a From date.
3. Select a To date.
4. Click Refresh Report. The report refreshes with the information within the date range you selected. Click Cancel to close the report without viewing any changes.

You can sort on a column heading by right clicking on the drop-down menu and selecting the sorting option.

18.10 Analyze Proposal
This functionality is available for ODOT and Profile Admins to review and analyze a consultant proposal. The analysis cannot be completed until the Prime Consultant formally submits the proposal through the Project Profile Wizard > Proposal Submission. The profile must be in the Submitted for Proposal Review status or later. To use the Analyze Proposal feature, follow these steps:

1. Click Menu > Analyze Proposal. The Select a Fee Proposal to Analyze screen opens.
2. Select whether to analyze the entire proposal or a specific Consultant company’s proposal and the company from the drop-down list.

3. Click **OK** to submit the analysis request and the **Analysis** screen opens. Click **Cancel** to close the screen without analyzing a proposal.

4. Select a Category, Group, and Dupe to view other pieces of the analysis. Tasks are assigned to a category so the details display when you select the Category.
   
   **Note:** When you change the Group, the system displays the new group information immediately. If Duplication filtering is available, the duplicated tasks selected are grouped together for each duplication “set.”

5. Enter quantity and rate information then click **Tab** to save the information.

   You can add a comment and narrative to a task using the expander buttons on the right side of the frame. You open the Comment or Narrative screens and enter information. Refer to the **Task Comments and Flags** and **Task Narrative** sections for additional information.

**Buttons**

**Note:** You can select more than one task to perform the following actions using the checkboxes to the left of each task in the lower frame.

**Add Task to Group:** Select a task in the upper portion of the screen, click this button, and the task is added to the list in the lower portion of the screen. The task is added to Group you select in the lower portion of the screen. <This button is only available when a task is selected in the upper portion of the screen.>

**Remove Task from Group:** Click to remove a task from the lower portion of the screen. It is removed from the selected Group and can be added to a different group using the **Add Task to Group** button. <This button is only available when a task is selected in the lower portion of the screen.>
**Add Comment**: Select a task in the lower frame then click this button to add a comment for the task. The **Add Comment** screen opens. Refer to the [Task Comments: Thread Viewer](#) section for additional information on the task comments functionality.

**Analysis Notes**: Click to add notes to the analysis information. The **Analysis Notes** screen opens. Each note is kept per group and user.

**States Estimates**: Click to open the States Estimate Model. Refer to the [States Estimate Model](#) section below for additional information.

**Print**: Click to open the **Print Analysis** screen. You can select whole categories or sections within a category, then click **Print**.

**Analyze Entire Proposal**: Click to return to the full analysis of the proposal.
19 States Estimate Model

Related Roles: ODOT Admin and Profile Admin

This functionality is available for ODOT and Profile Admins to generate a States Estimate Model (Planning, Percent of Construction, and Blended Hourly Rates) and prove a link for the Guidelines of Negotiation of Consultant Fees document. The Planning Analysis information is set by an ODOT Admin using the Manage Planning Ranges screen. The Blended Hourly Rates Guidelines are set by an ODOT Admin using the Manage Hourly Rate Changes screen. This model is available for each profile no matter what status the profile is set to.

19.1 Planning Analysis

To run the States Estimate Model, follow these steps:

1. Login as an ODOT or Profile Admin role.
3. Click in a Number or Cost/Unit to enter information in the fields.
4. Press Tab to move from field to field or click in new fields.
5. Click the Add button to insert a new row.
6. Enter a Category and Range for the new row.
7. Enter any notes for a selected category (optional).
8. Click Save to keep all changes. Click Remove to delete a row that you have previously added (default system rows cannot be deleted). Click Cancel to refresh the screen without saving any changes.
9. Click Print to print the analysis screen with all saved changes. This displays the Planning Analysis, Design as a Percent of Construction, and Blended Hourly Rates Guidelines together on the screen then prints each piece on separate sheets of paper.
19.2 Detail Analysis

<Future Functionality>

19.3 Design as a Percent of Construction

This portion of the States Estimate displays how much of the construction is the design portion. You can use the fields to adjust the numbers. To adjust the numbers, follow these steps:

2. Select the Design as a Percent of Construction heading. The Design as a Percent of Construction screen opens.
3. Edit the From or To field to change the date range as needed.
4. Select a different Increment from the menu, if needed.
5. Click Submit. The list of figures changes to match the new information entered.
6. Click Save to keep the changes. The next time you open the States Estimate Model for this profile the new figures you entered will be used and Ellis information will update. Click Cancel to close the screen without saving the changes.
7. Click Print to print the design screen with all saved changes. This displays the Planning Analysis, Design as a Percent of Construction, and Blended Hourly Rates Guidelines together on the screen then prints each piece on separate sheets of paper.

The Ellis data information updates each time the States Estimate Model opens.

19.4 Blended Hourly Rates Guidelines

When you click the Blended Hourly Rates Guidelines button in Menu > States Estimate, the guidelines open. These guidelines are edited by ODOT Admins using the Manage Hourly Rate Changes screen.
19.5 Guidelines for Negotiation of Consultant Fees

When you click the Guidelines for the Negotiation of Consultant Fees button in Menu > States Estimate, the document opens. You can print or save this document as needed. This link will always be directly to the latest ODOT document available so check the date on the cover page to confirm the version you are looking at.
20  Agenda Options

**Related Roles:** ODOT Admin and Profile Admin

ODOT and Profile Administrators can only access the Agenda options for profiles that are in the Executing Agreement status. The Agenda is an analysis summary of project description, work to be performed, and delineation of fees. If a particular tab of the screen doesn’t have information entered, that tab is not displayed on the printout.

20.1 Manage Agreement Parts

Use this functionality to enter part information in the system. An agreement part is a specific item of work with an assigned fee. Part information is kept across Mods and fees are calculated across mods as needed. To manage the parts, follow these steps:

1. Select Menu > Agenda/Agreement. The Agenda screen opens.

2. Click the Manage Agreement Parts tab.
20.1.1 New Part
3. To add a new part, click the New Part button. The Add Agreement Part screen opens.

![Add Agreement Part Screen]

4. Enter a part number and description.
5. Click Save to add the part to the list. Click Close to discard the part information entered and return to the Manage Agreement Parts screen.

The part is now added to the list.

20.1.2 Edit Part
3. To edit a current part on the list, select the part to edit from the list.

20.1.2.1 Assign Tasks Tab
4. Click the Edit Part button or double-click on the row. The Assign Tasks tab is the default tab that opens.

![Assign Tasks Tab]

5. Edit the fields as necessary.
6. Click Save to keep the changes. Click Close to close this screen and return to the Agenda screen. Click the Part Detail tab as needed.
20.1.2.2 Part Detail Tab

7. Click the Part Detail tab to edit the details about the part. The mod information displays on the screen here.

![](image)

8. Check the If Authorized box if necessary. No other fields are editable on this screen.
9. Click **Save** to keep the changes and click **Close** to return to the **Agenda** screen without saving the changes.

20.1.3 Delete Part

3. Click the **Delete Part** button. The **Delete Agreement Part?** Verification screen opens.

![](image)

4. Click **Yes** to delete the agreement part. Click **No** to cancel the deletion and return to the **Manage Agreement Parts** screen.

20.2 Create Agenda

To create an agenda for a proposal in the Executing Agreement status, you can enter information across various tabs in the system.

20.2.1 General Agenda Info Tab

1. Select Menu > Agenda/Agreement with a profile open. The **Agenda** screen opens.
2. The General Agenda Info tab is the default tab to open. You can edit information on this screen, adding additional information on the agenda.

3. Click **Save**.

**Buttons**

- **Print**: Click to open the printing options for the Agenda, including all tabs on individual pages.
- **Save**: Click to keep the changes. The **Agenda** screen closes and the Task list.
- **Close**: Click to discard the information entered, close the **Agenda** screen, and return to the Task list.

**20.2.2 Descriptions Tab**

Use this tab to edit the descriptions that display throughout the profile.

1. Select Menu > Agenda/Agreement with a profile open. The **Agenda** screen opens.
2. Click on the Descriptions tab.
3. Enter or edit the descriptions under each heading.

4. Click **Pop Out** if you need a larger screen view for a specific text box.

5. Click **Save** to keep your changes.

**Buttons**

**Pop Out:** Click if you need a larger screen view for the text boxes.

**Print:** Click to open the printing options for the Agenda, including all tabs on individual pages.

**Save:** Click to keep the changes. The **Agenda** screen closes and the Task list.

**Close:** Click to discard the information entered, close the **Agenda** screen, and return to the Task list.

**20.2.3 Summary of Fees by Firm Tab**

1. Select Menu > Agenda/Agreement. The **Agenda** screen opens.

2. Click on the Summary of Fees by Firm tab.
This screen is for viewing purposes only.

**Buttons**

**Print:** Click to open the printing options for the Agenda, including all tabs on individual pages.

**Save:** Click to keep the changes. The Agenda screen closes.

**Close:** Click to close the Agenda screen and return to the Task list.

### 20.2.4 Summary of Agreement Parts Tab

3. Select Menu > Agenda/Agreement. The Agenda screen opens.

4. Click on the Summary of Agreement Parts tab.

5. Enter information as needed. Double-click the entry to edit it.

   **Note:** Use the If Authorized column to force agreement parts to be set to If Authorized across all profiles.

6. Click **Save**.

**Buttons**

**Print:** Click to open the printing options for the Agenda, including all tabs on individual pages.

**Save:** Click to keep the changes. The Agenda screen closes and the Task list.

**Close:** Click to discard the information entered, close the Agenda screen, and return to the Task list.

#### 20.2.4.1 Adjust Net Fee

Click to define the net fee override for this profile.

1. Select Menu > Agenda/Agreement. The Agenda screen opens.

2. Click on the Summary of Agreement Parts tab.
3. Click Adjust Net Fee. The **Define Net Fee Override** screen opens.

4. Enter the fee override and comments. The **Save** button becomes available.

5. Click **Save** to keep the entered information. Click **Cancel** to close the screen without saving the override information. Click **Clear** to delete all of the override information entered on the screen without saving it – screen remains open.

### 20.2.5 Rate of Pay Tab

1. Select Menu > Agenda/Agreement. The **Agenda** screen opens.

2. Click on the Rate of Pay tab.

3. Click the ODOT Noted Ray of Pay Roles or Rate of Pay Roles from Proposal tabs, depending what information you need to view.

**Buttons**

- **Add Role**: <ODOT Noted Rate of Pay Roles tab only> Click to add a new role
- **Remove Role**: <ODOT Noted Rate of Pay Roles tab only>
- **Print**: Click to open the printing options for the Agenda, including all tabs on individual pages.
- **Save**: Click to keep the changes. The **Agenda** screen closes and the Task list.
- **Close**: Click to discard the information entered, close the **Agenda** screen, and return to the Task list.
20.2.5.1 Rate of Pay Roles from Proposal Tab
This screen is for viewing purposes only.

20.2.5.2 ODOT Noted Rate of Pay Roles Tab
Use this screen to enter ODOT’s noted rate of pay roles for the profile.
1. Select Menu > Agenda/Agreement. The Agenda screen opens.
2. Click on the Rate of pay tab.
3. Click the ODOT Noted Rate of Pay Roles tab.

![Rate of Pay Roles from Proposal Tab](image1.png)

You can add or delete a rate using the buttons. You cannot edit a current rate.

**Add Role**
4. Click **Add Role** to insert another role. The ODOT Add Role Rate screen opens.

![Add ODOT Role Rate](image2.png)

5. Enter information as needed. All three fields are required.
6. Click **Save** to keep the new role rate. Click **Close** to close the Add ODOT Role Rate screen without saving the changes.

**Remove Role**
4. Click on the firm to delete on the list. The Remove Role button is now available.
5. Click **Remove Role**. A confirmation message screen opens.
6. Click **Yes** to delete the role. Click **No** to keep the rate.

### 20.2.6 Unit Rate Table Tab

1. Select Menu > Agenda/Agreement. The **Agenda** screen opens.
2. Click on the Unit Rate Table tab.

![Add Rate Screen](image1)

**Add Rate**

3. Click **Add Rate** to insert another rate. The **Add Rate** screen opens.
4. Enter the information as needed.
5. Click **Save** to keep the information or **Close** to close the screen without saving the information. You return to the Unit Rate Table tab.

**Remove Rate**

3. Select a rate row.
4. Click the **Remove Rate** button. A confirmation message screen opens.
5. Click **Yes** to delete the selected rate. Click **No** to keep the selected rate.

**Buttons**

**Print:** Click to open the printing options for the Agenda, including all tabs on individual pages.

**Save:** Click to keep the changes. The **Agenda** screen closes and the Task list.

**Close:** Click to discard the information entered, close the **Agenda** screen, and return to the Task list.