TOPS
User Guide

February 6, 2019

Background: This system was built in 2013 to provide a new way for Consultant Engineering companies to submit their Letters of Interest (response packet). In the past, these pdf files were submitted via email to ODOT.   Issues such as file sizes being restricted by email systems caused problems for the users, along with quota restrictions for the receiving in-box were things that we wanted to alleviate. This new system was designed with a basic requirement in mind - the user wants to submit a response to a solicitation in as simple a manner as possible.   System authentication (logging in with appropriate credentials) and system authorization (being able to run appropriate processes) have been built into the design of the system to make sure the contracting community can perform the needed tasks.

In 2014, additional processing capabilities were requested to enable consultants to be able to submit on-line invoices.   In order to accommodate this, the system needed an integration point into the department's Contract Administration system so that the contract lines that are entered in that system could be used to control the entries that were associated with the invoice details.   And, to further provide timely management of the taxpayer's interests, the ability for department personnel to enter consultant performance evaluations at specified project milestones was added. Finally, an interface with the department's Financial Management System was needed to pass the invoice data directly into the claim processing system. This seamless integration ensures that duplicate data entry never occurs, cutting down on errors that get introduced into the process from that activity.

This purpose of this guide is to focus on the issues faced by the consulting firm as the user works with TOPS.

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

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

Main steps to use the system:

1) Register as a user – specify your company
2) Retrieve your temporary password from your email
3) Log in and change the password
4) Verify your user account and company profile
5) Respond to Solicitation Requests
6) Enter invoice data in order to facilitate the payment process

Main steps to respond to requests:

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

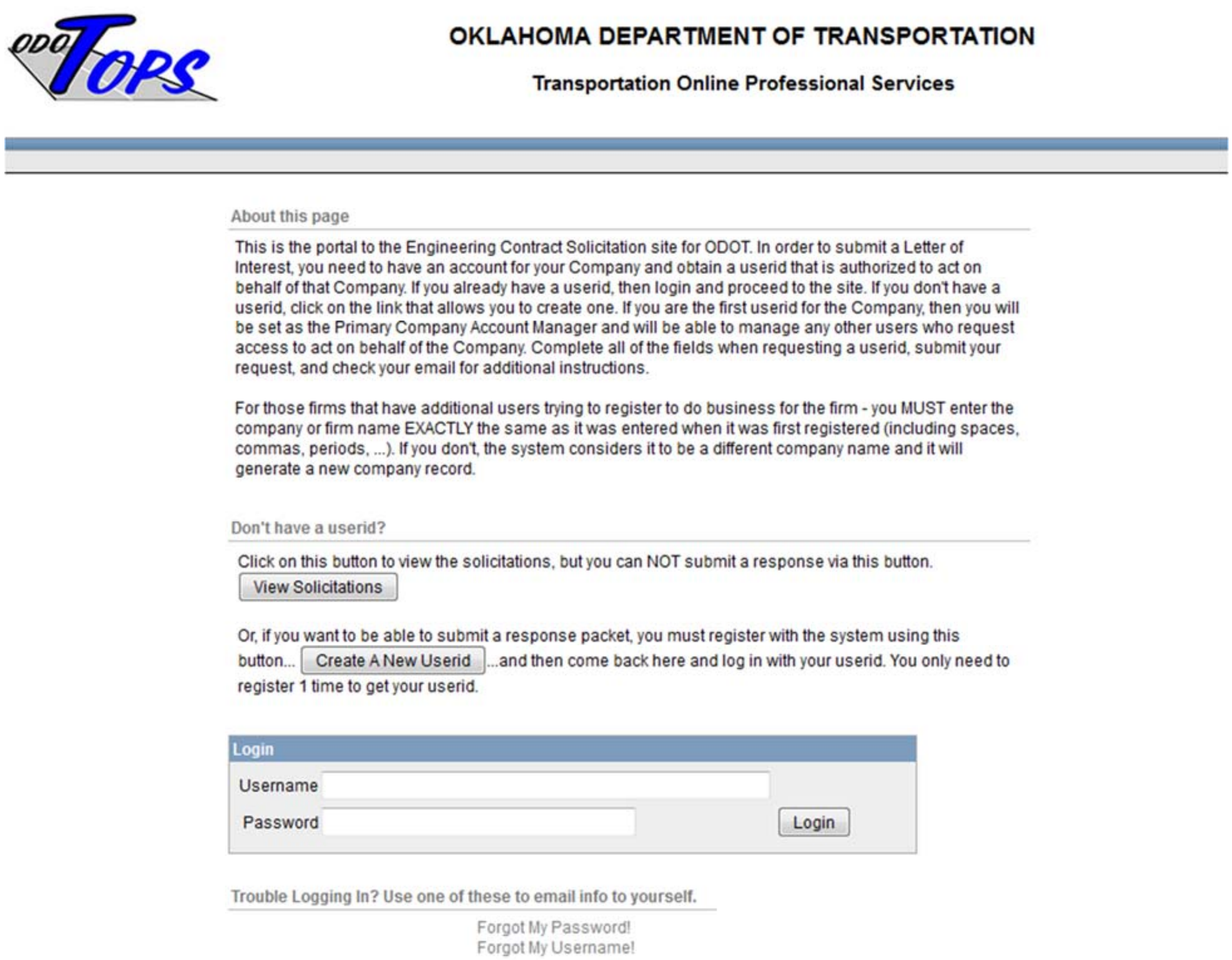
Contents

Getting Started – Create a userid and Log in to TOPS

https://biappsrv.odot.ok.gov/apex/f?p=750:1

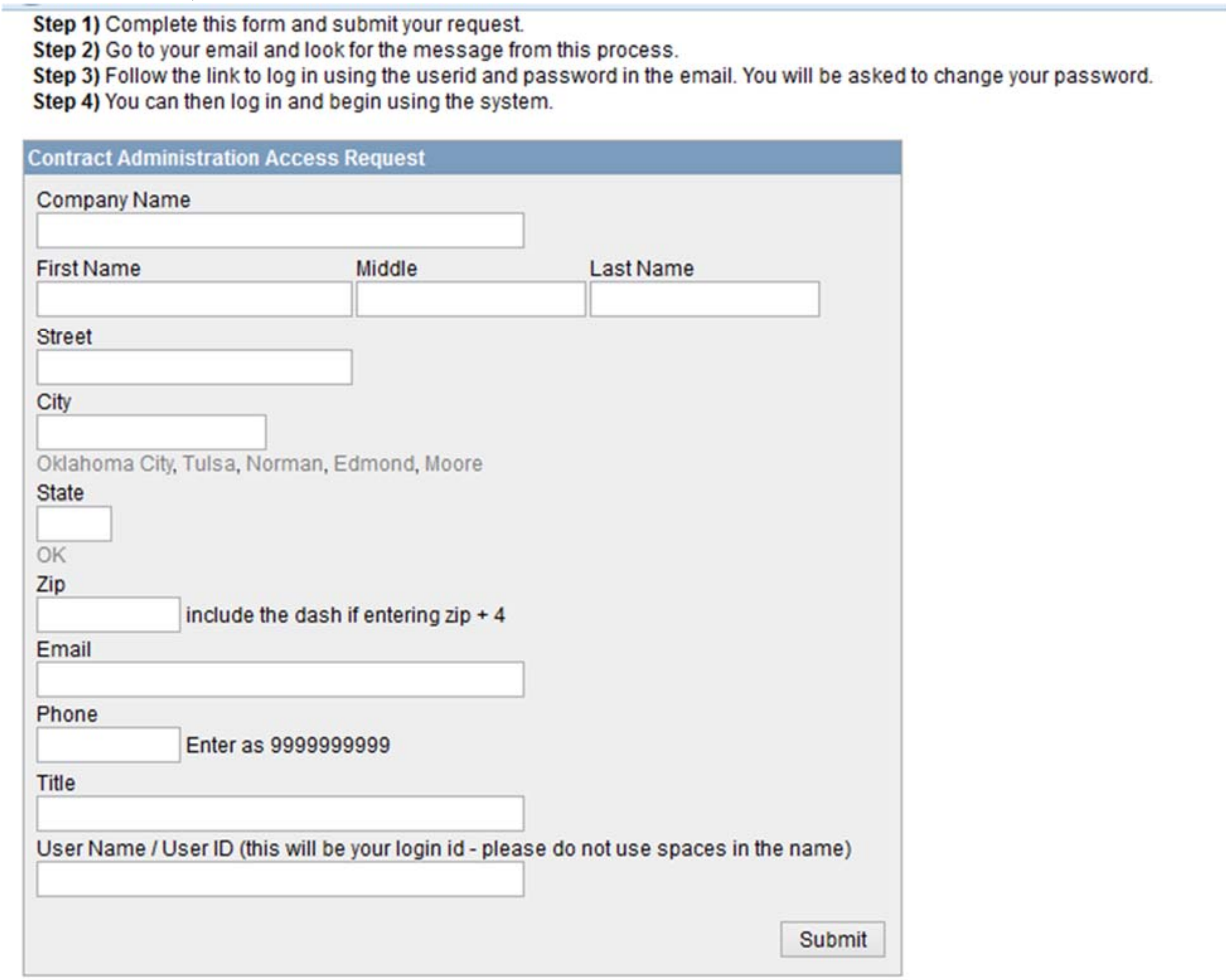
Click on the Contract Solicitation Response System link. If this is your initial access into the system, you need to establish your user account.

Creating a Userid:



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

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


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

Contract Administration Access Request

Company Name

First Name
Middle
Last Name

Street

City
Oklahoma City, Tulsa, Norman, Edmond, Moore

State
OK

Zip
include the dash if entering zip + 4

Email

Phone
Enter as 9999999999

Title

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

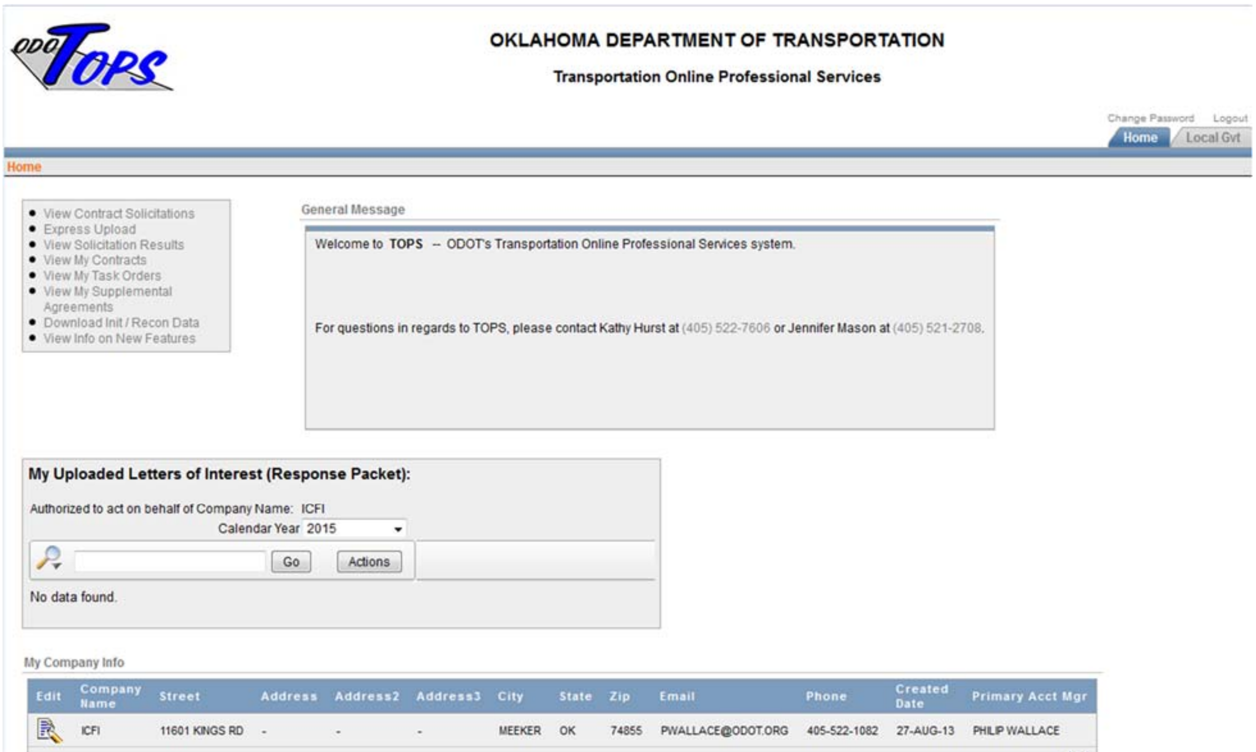
Submit

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

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

http://biappsrv.odot.ok.gov/apex/f?p=604:1

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



Getting around in the system – navigation elements

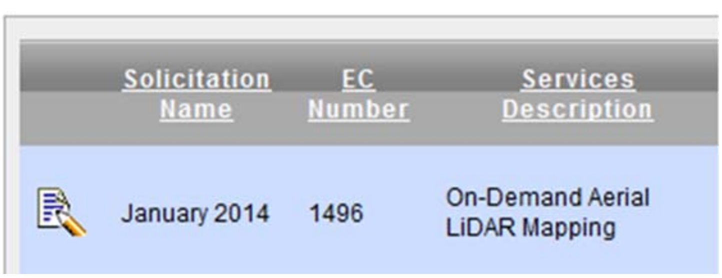
Key features that will make the user experience less frustrating begin with understanding the navigation elements.

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

A very important area is the breadcrumb region of the page. That is the portion where links appear as you move deeper into the web site structure that will help you get back to where you started (or anywhere along the way). Here is an image of what this region might contain:

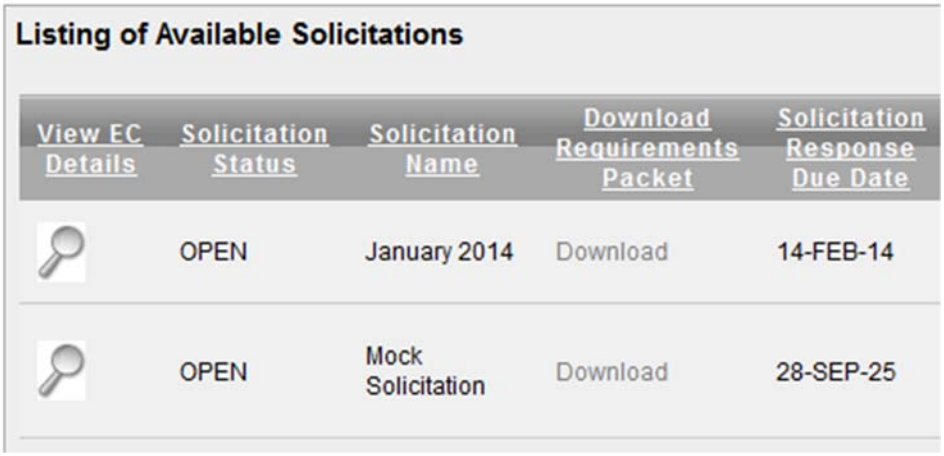
As you can see, the current page breadcrumb entry is at the end of the string, with the greater than sign between the entries. Each portion of the breadcrumb is a link that will take you back to a specific page that you visited.

We also use icons that represent "edit a specific record"

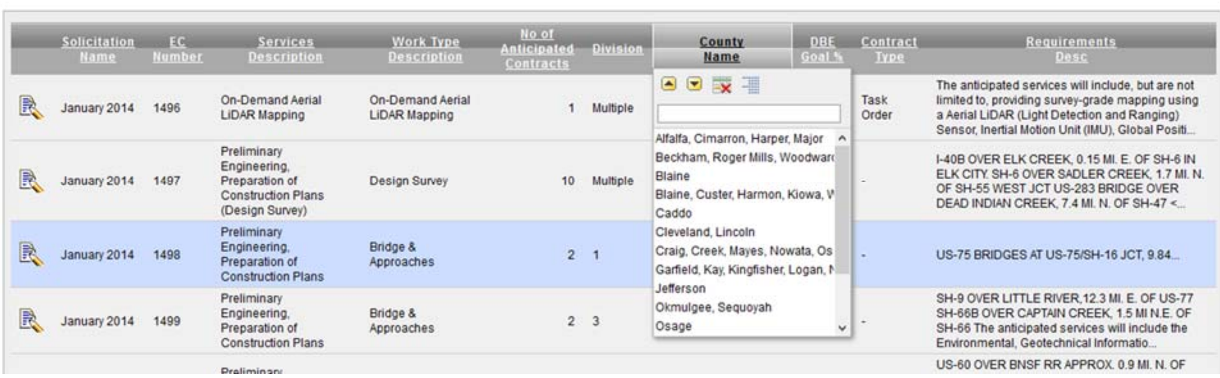


That icon (the pencil and paper) is typically on the left side of the screen on each record when you are allowed to edit it. It is the method we use to navigate to the page used for data entry.

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



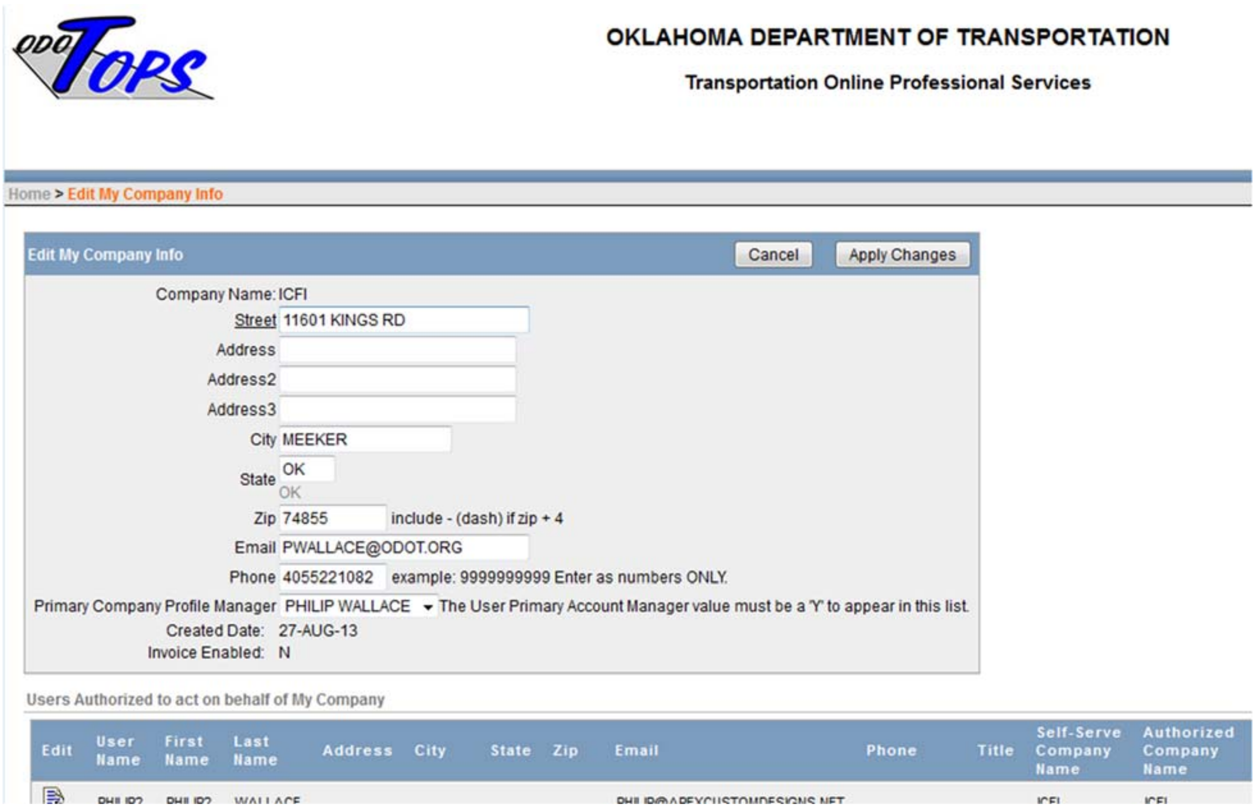
Filter and sorting Options: Another feature you need to be aware of is the ability to filter the report section of some of the pages so you only see specific records. That feature lives in the "gray bar" that holds links for specific things. Any time you see this bar, you should know how to help limit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



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

Your company profile

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



Uploading a response packet

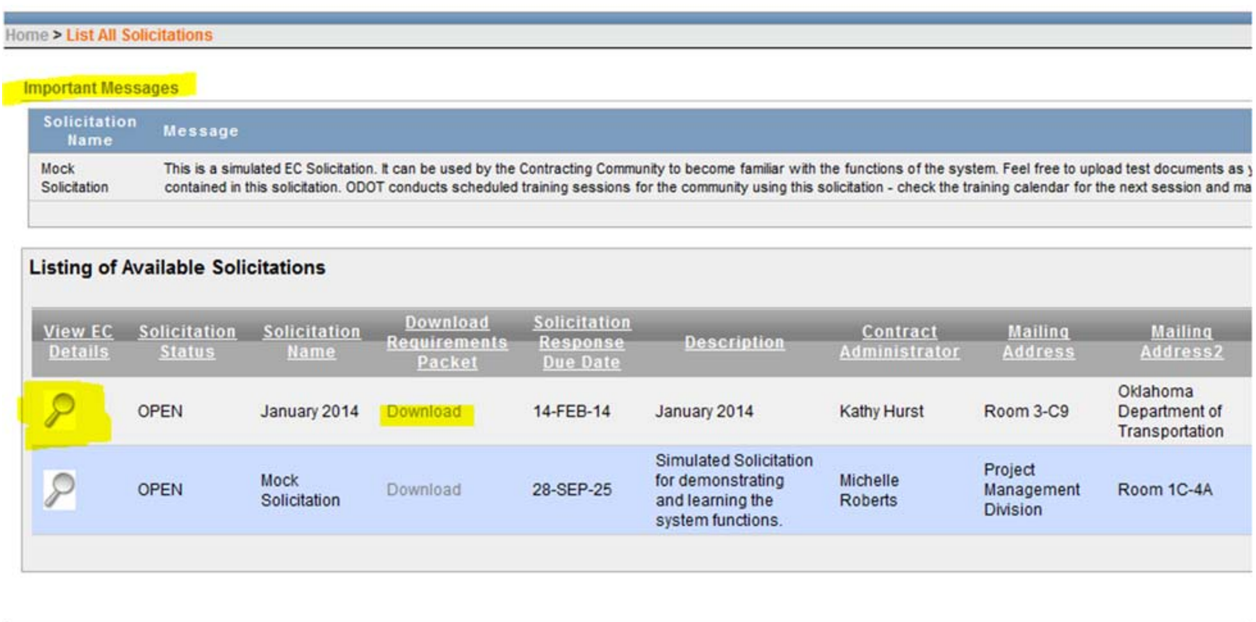
One of the goals of the system is to make uploading a response file simple and quick. In order to do this, you must understand ODOT's numbering scheme for the projects. Each project has an identifier that we call the EC number. Each EC was assigned to a specific solicitation. You must understand that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

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

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

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

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

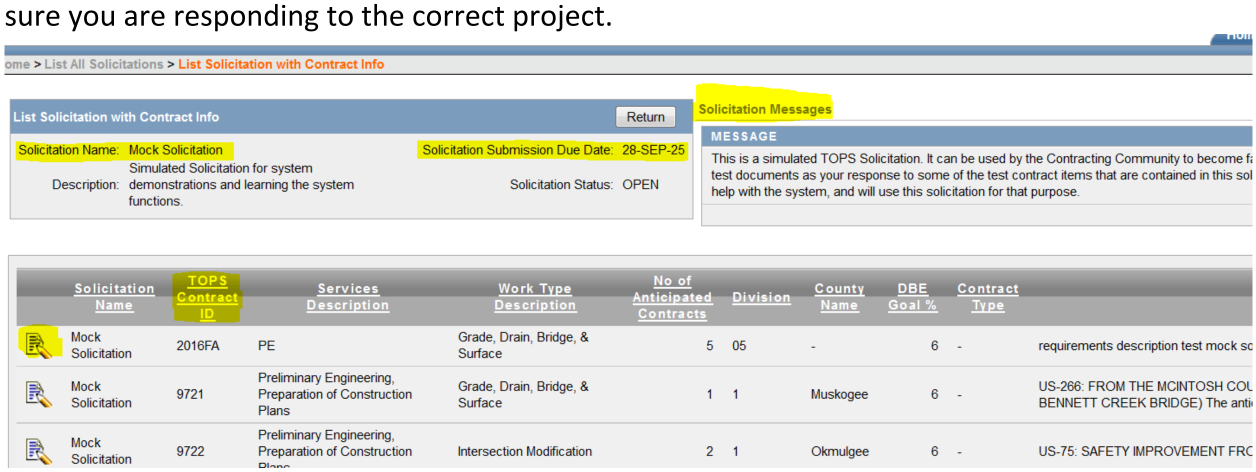


Areas that we cover here are the Important Messages, the View EC Details, and the Download link. They have been highlighted in the image for you.

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

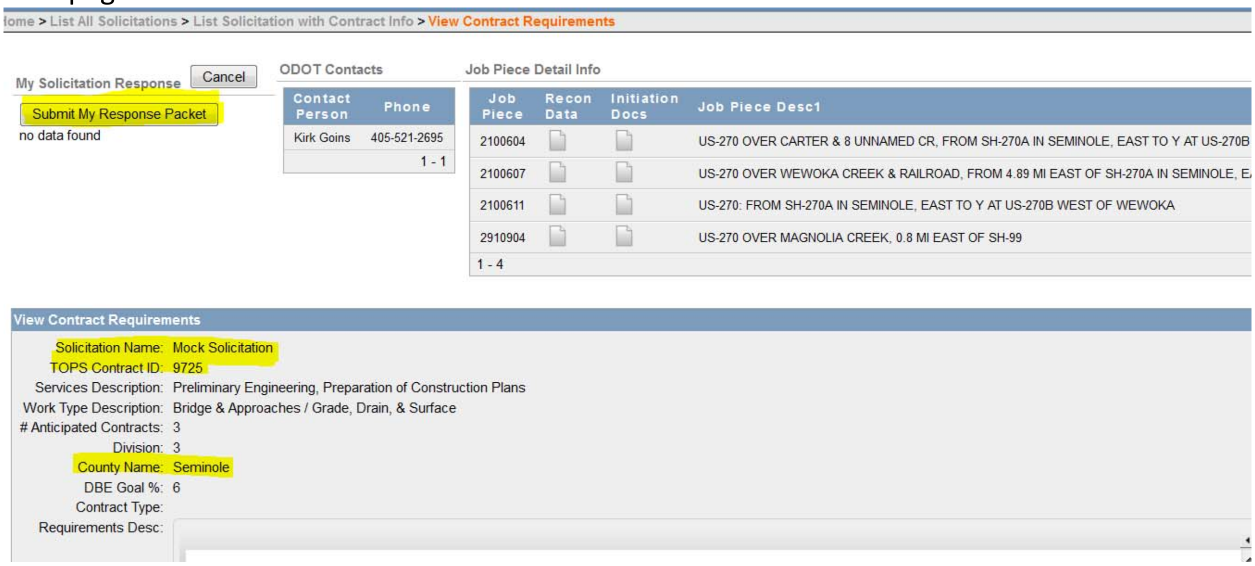
The Download link will allow you to download the pdf file that contains the solicitation document distributed by ODOT. This is the same document format that has been used in the past, and contains a list of all of the projects (EC numbers/Tops Contract ID) that are on the specific solicitation.

The View EC Details icon will drill down into a list of all of the TOPS Contract ID that are represented by the solicitation. Click on this link to open that page and see the individual projects that exist as part of that group.
This image represents a list of the TOPS Contract ID that exist on the Mock Solicitation. Notice that the Solicitation Name and Due Date are highlighted here to get your attention. And, the edit icon exists to allow you to provide data in some way – in this case, you will be submitting your response file. Also, notice the TOPS Contract ID along with descriptive text to help make sure you are responding to the correct project.

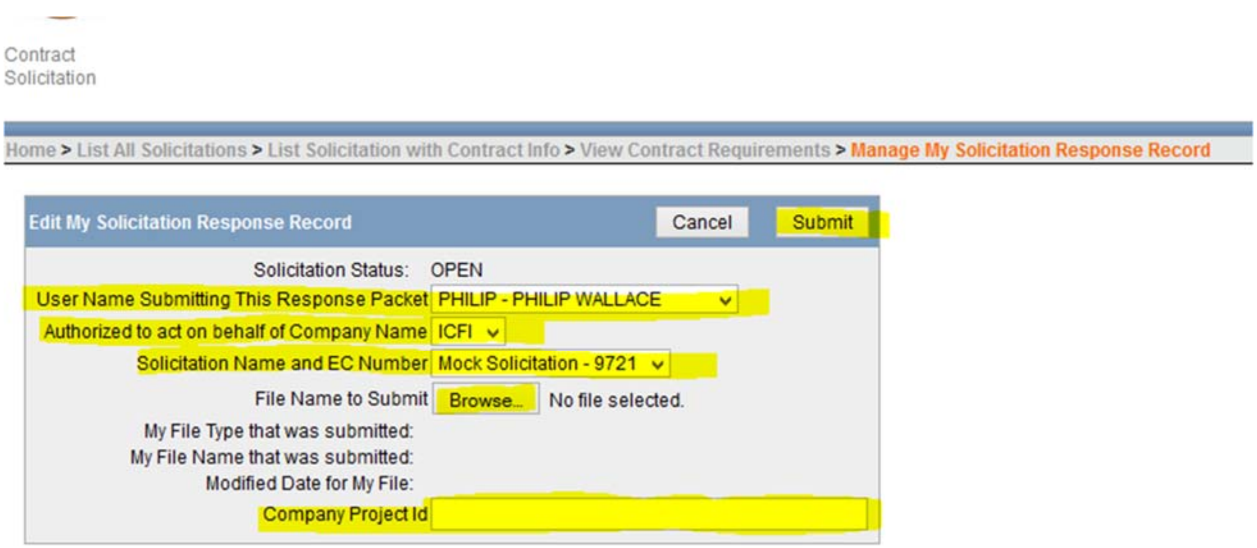


And, notice that there is a Solicitation Message area where ODOT can send out urgent messages that pertain to just this specific solicitation.

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



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

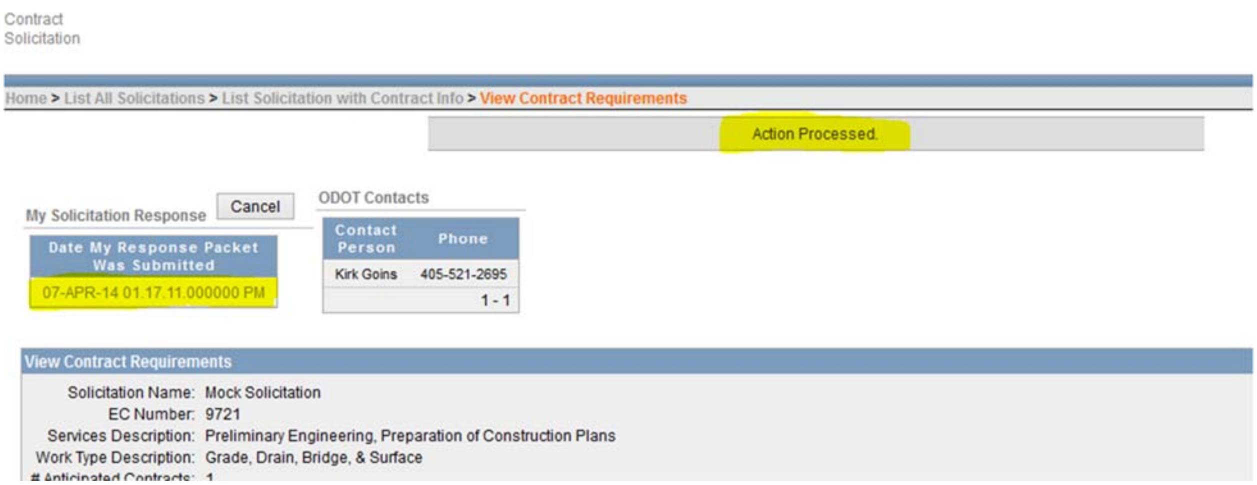


This is the page where you need to verify (again) that you are on the correct Solicitation and EC Number.

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

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

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

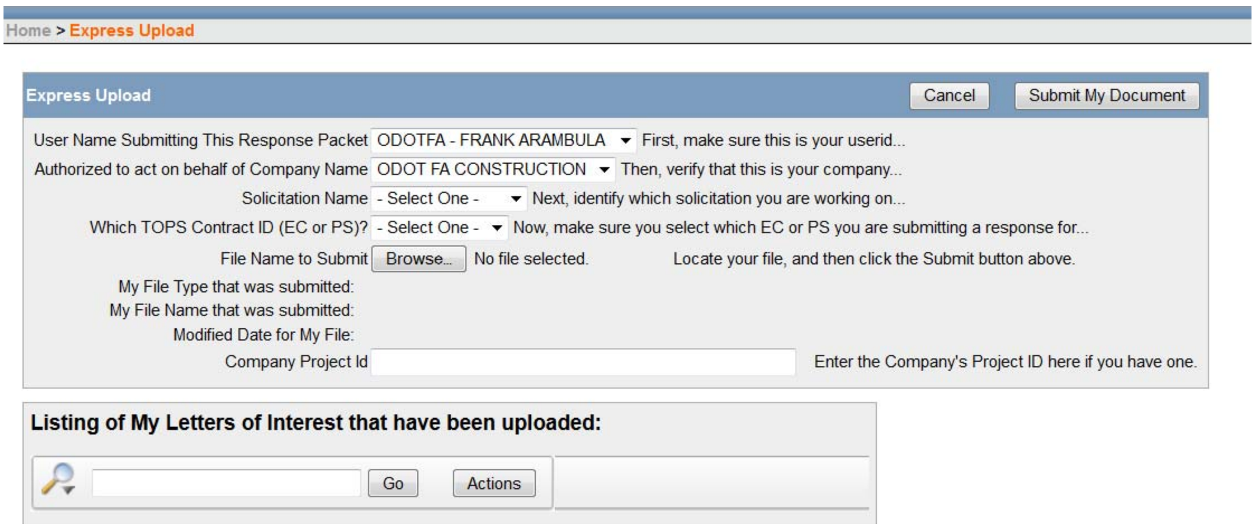


You should see the Action Processed message, and the date and time that your document was uploaded. The Upload button no longer appears, but the Date and Time are a link that will allow you to edit your submission again if you need to. However, the only option will be to delete the file that is on the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

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

Express Upload

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

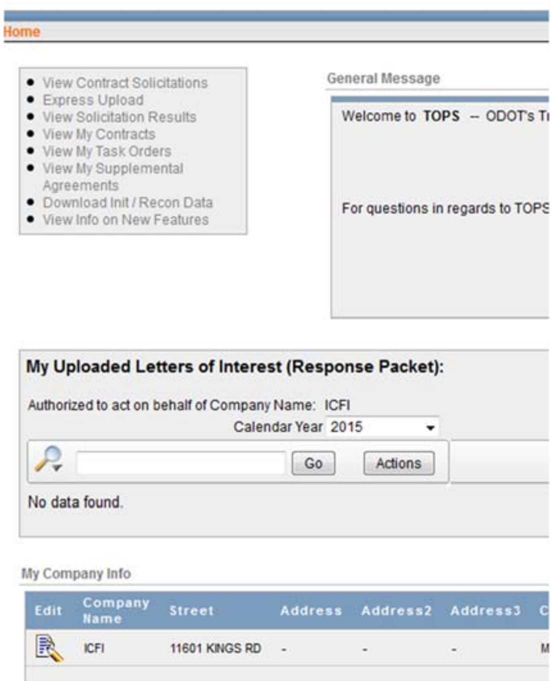


Notice on this page that you use the drop-down lists to specify the solicitation name (the solicitation must be in the OPEN status for it to appear here) along with the EC number. You use the browse button to search your pc for the file you want to upload, and optionally you can enter your company project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

Invoice Processing

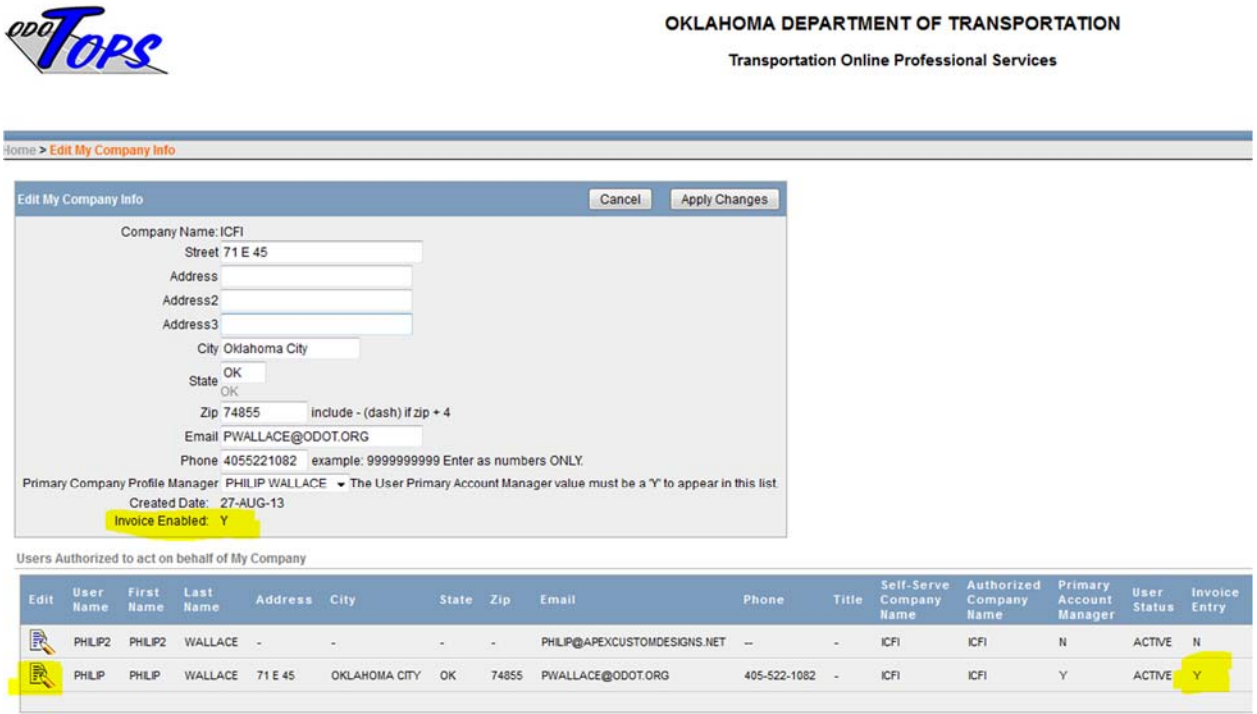
On-line invoice processing is a new feature in TOPS. Each firm must have invoice processing enabled in order to use this feature. However, in order to be authorized, you need to contact ODOT to request the security change and provide some additional information that is needed.

Check to see if your firm has been set up for invoice processing. Do this by going into the company record from the main menu page:



Click the edit icon to bring up the page that allows you to manage the company profile.

Your page should look similar to this example:



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Transportation Online Professional Services

Home > Edit My Company Info

Edit My Company Info — Cancel — Apply Changes

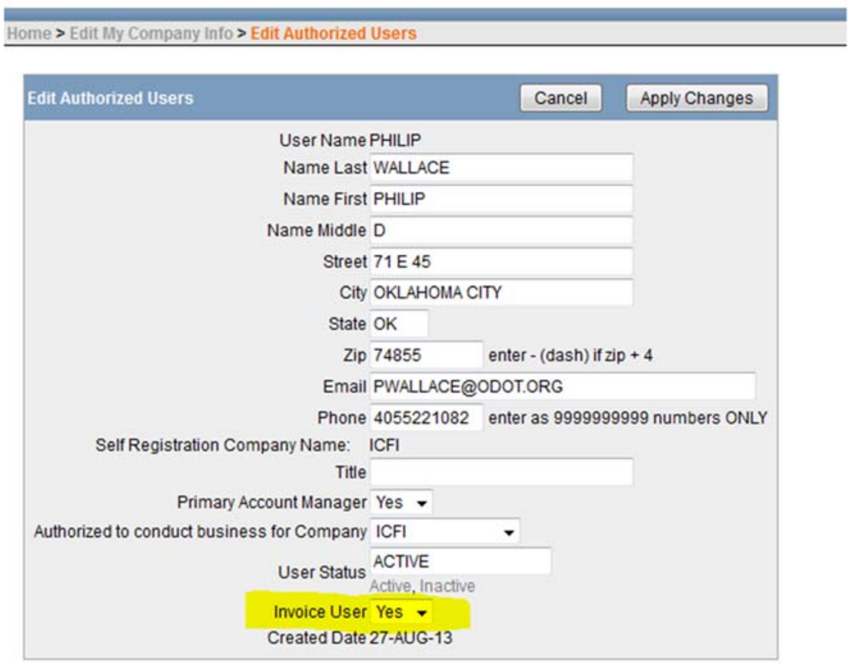
Company Name: ICFI
Street 71 E 45
Address
Address2
Address3
City Oklahoma City
State OK
Zip 74855 include - (dash) if zip + 4
Email PWALLACE@ODOT.ORG
Phone 4055221082 example: 9999999999 Enter as numbers ONLY.
Primary Company Profile Manager PHILIP WALLACE The User Primary Account Manager value must be a 'Y' to appear in this list.
Created Date: 27-AUG-13
Invoice Enabled: Y

Users Authorized to act on behalf of My Company

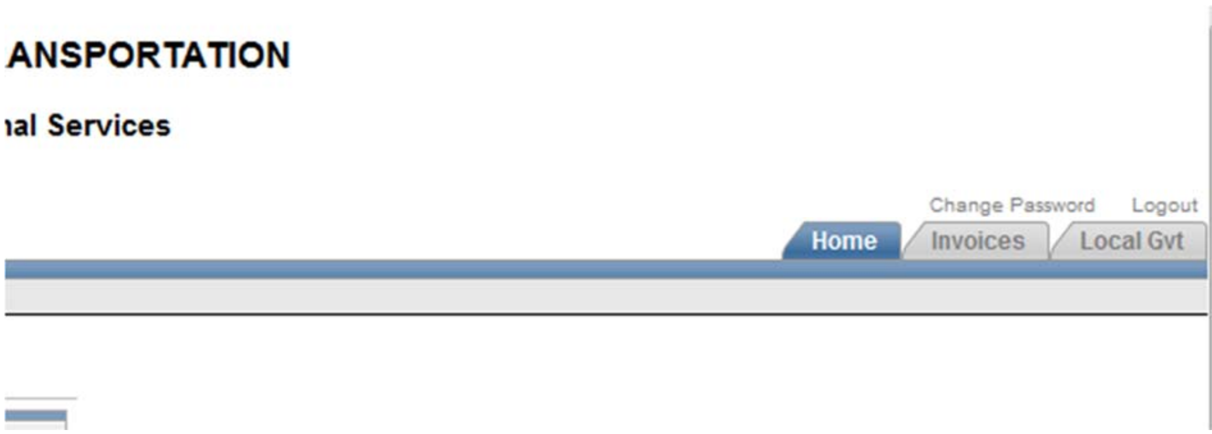
Edit	User Name	First Name	Last Name	Address	City	State	Zip	Email	Phone	Title	Self-Serve Company Name	Authorized Company Name	Primary Account Manager	User Status	Invoice Entry
	PHILIP2	PHILIP2	WALLACE	-	-	-	-	PHILIP@APEXCUSTOMDESIGNS.NET	--	-	ICFI	ICFI	N	ACTIVE	N
	PHILIP	PHILIP	WALLACE	71 E 45	OKLAHOMA CITY	OK	74855	PWALLACE@ODOT.ORG	405-522-1082	-	ICFI	ICFI	Y	ACTIVE	Y

Once your firm has been set up by ODOT personnel, you will see that the data item for Invoice Enabled gets changed to the letter Y.

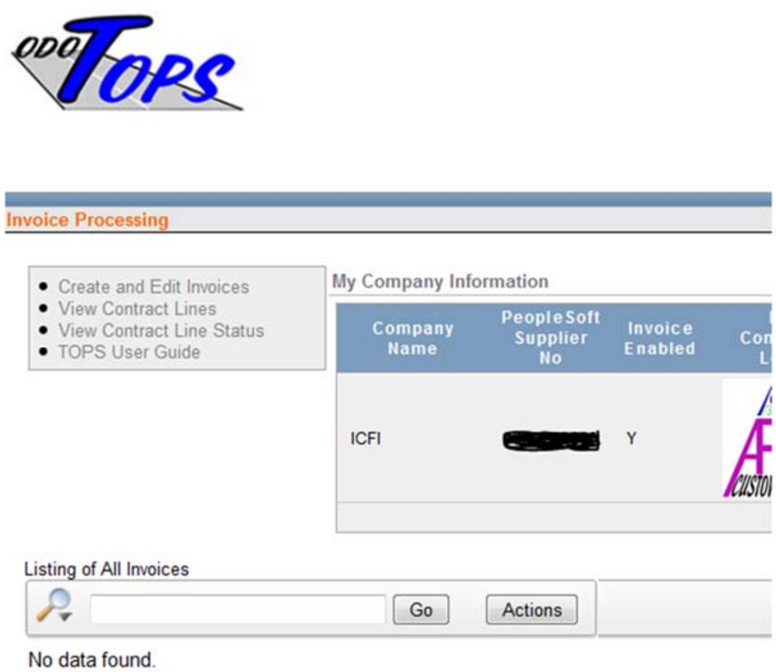
You can then authorize the users in your organization to be set up to enter and submit invoices by editing one or more of their records and changing the value of the data item for Invoice User. A value of Yes provides them with authorization to edit and submit invoices. ODOT is not involved in establishing which users in a firm are authorized to work with the invoice data. It is the responsibility of the consulting firm to make that determination and to control the access to this area of the system.



Once the firm has been set up for invoices and your userid authorized as shown above, you should notice a new tab on the top right side of the pages.

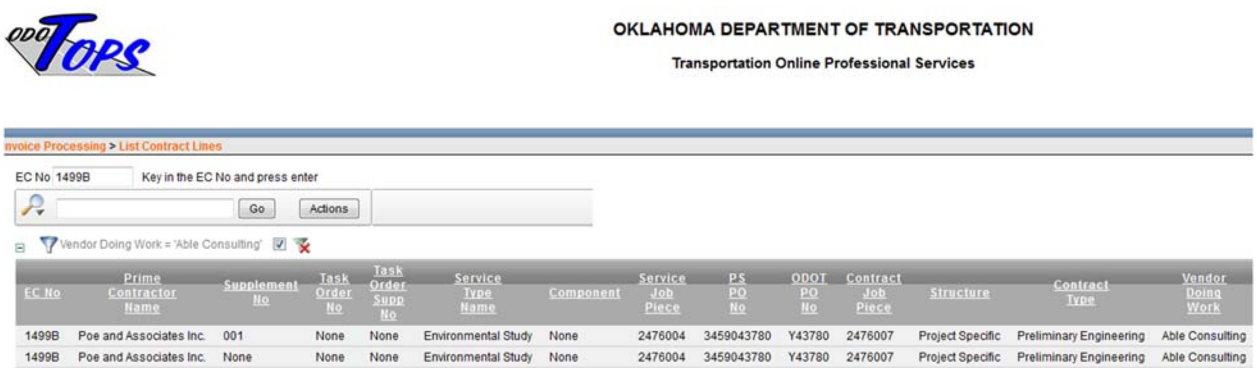


Clicking on this tab will bring up the invoice menu page.



The navigation links in the upper left allow you to create invoices and view the existing contract lines for all contracts with your firm. It is important that you start with the contract lines and get a good understanding of what those lines contain. Also, you should notice that the system provides you with a way to upload a company logo (on the Edit My Company page), and that logo will be used on your firm's invoice documents. But, you must work with ODOT to get the logo sized correctly so that it fits in the area on the document that is reserved for the logo. This will be part of the process of establishing the invoice processing capability with your company.

An example of a contract with detail lines is shown here. The image shows that in order to provide a unique identification of the contract line, you must be aware of the EC No, Supplement, Task Order No, Task Order Supplement, PeopleSoft PO ID, Service Job Piece, Component, and the vendor that is doing the work. ODOT tracks compliance with the DBE goals using this data, so you should see confirmation that you are utilizing a sub-contractor for a specific line.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Transportation Online Professional Services

nvoice Processing > List Contract Lines

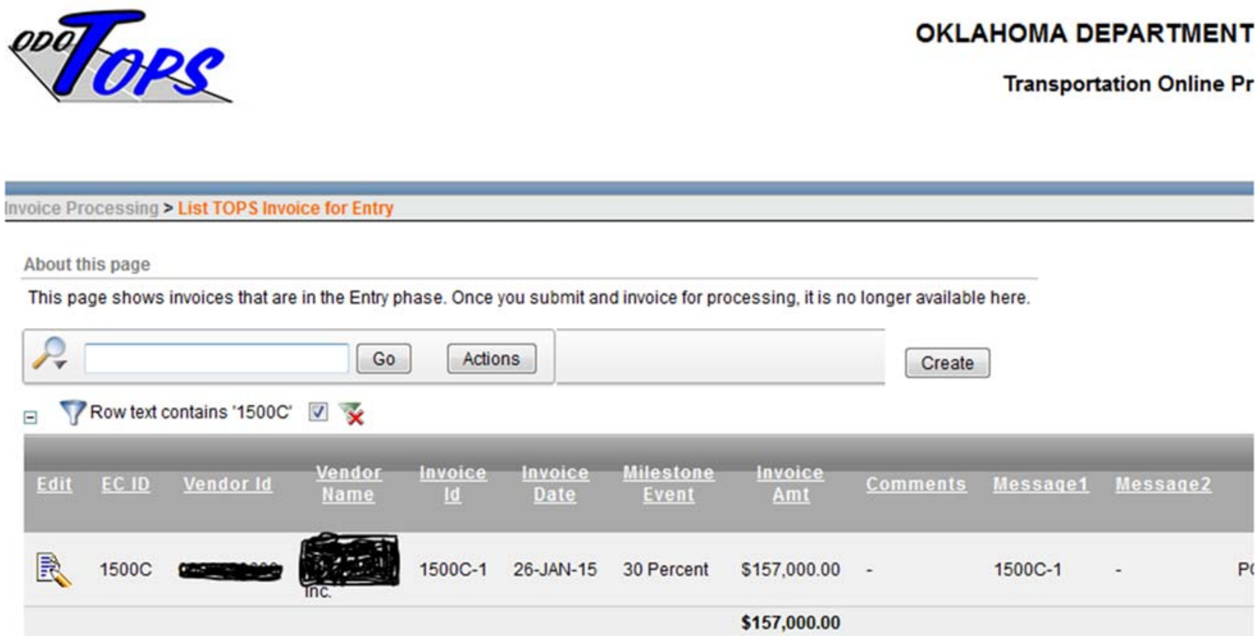
EC No 1499B Key in the EC No and press enter

Go Actions

Vendor Doing Work = 'Able Consulting'

EC No	Prime Contractor Name	Supplement No	Task Order No	Task Order Supp No	Service Type Name	Component	Service Job Piece	PS PO No	ODOT PO No	Contract Job Piece	Structure	Contract Type	Vendor Doing Work
1499B	Poe and Associates Inc.	001	None	None	Environmental Study	None	2476004	3459043780	Y43780	2476007	Project Specific	Preliminary Engineering	Able Consulting
1499B	Poe and Associates Inc.	None	None	None	Environmental Study	None	2476004	3459043780	Y43780	2476007	Project Specific	Preliminary Engineering	Able Consulting

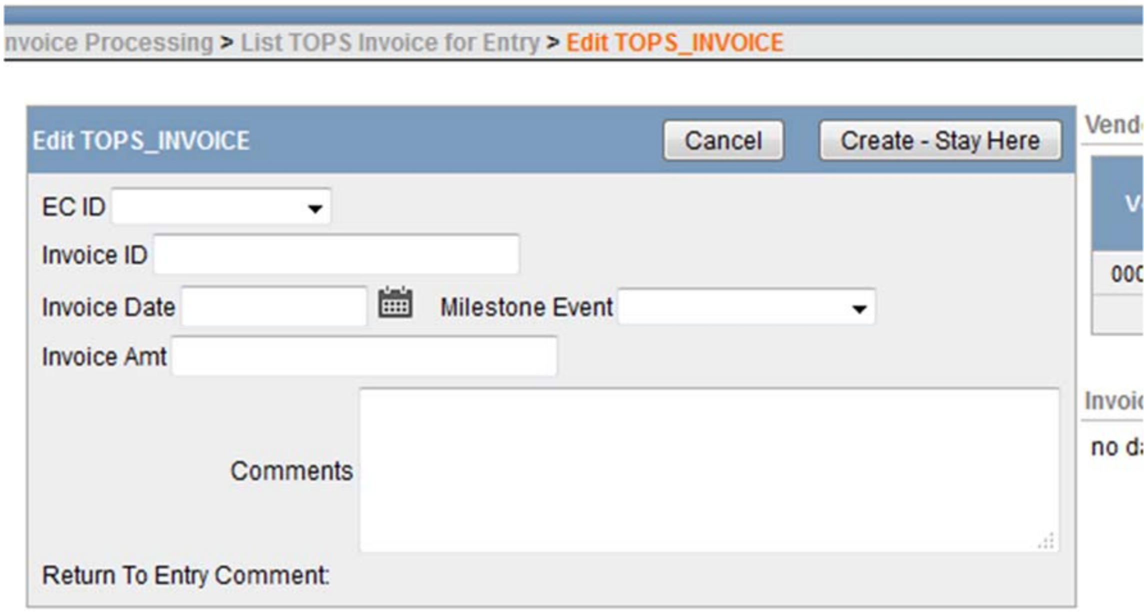
Compare your actual contract with the contract lines shown to make sure that your contract is set up correctly and that you understand the detail lines that will be used for your invoice. Once you are sure that everything is correct, you will be ready to enter invoice data against one or more of those lines. Use the link for Create and Edit Invoices to take you to a page that lists all of the invoices that are in the "Entry" phase. An example of that page is shown:



As you prepare your invoice, it is in the "Entry" phase. It will remain in this phase until you submit it for processing. If you are creating a new invoice, use the Create button shown in the image above. However, if you need to edit an existing invoice, use the edit icon on the left side of the screen on the record you wish to edit.

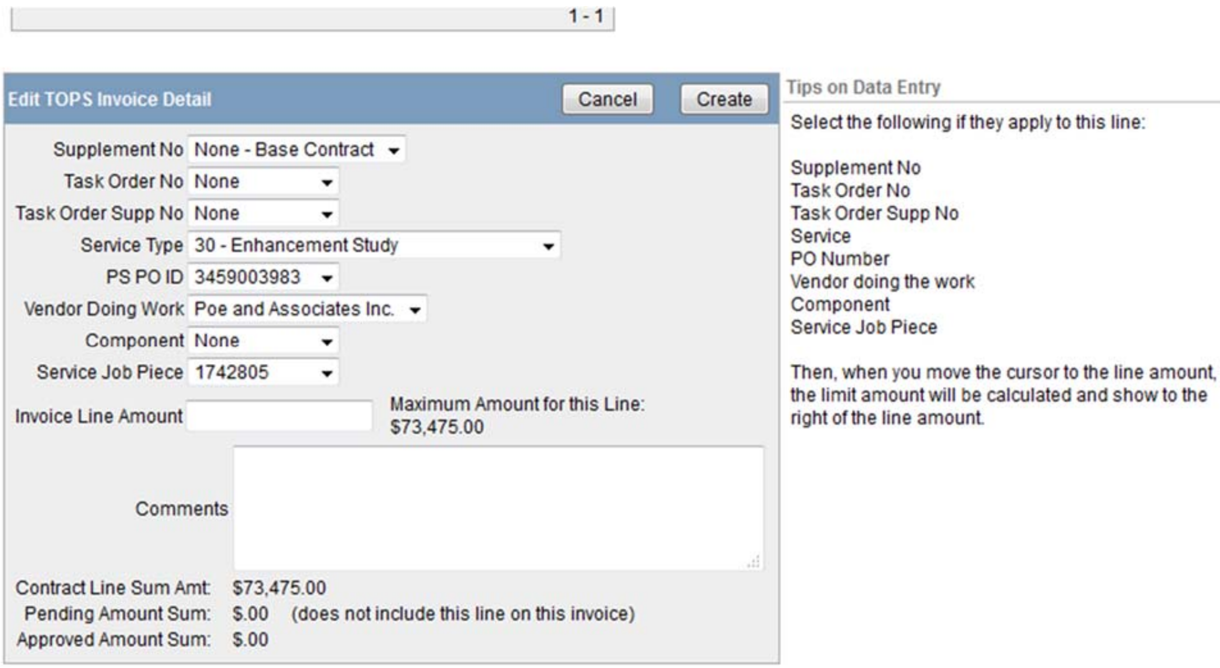
The screen shown below is used to enter data associated with the invoice. You start by selecting the EC ID from the drop-down list. It will show only the contracts that your firm has. Enter your firm's invoice id, the date, milestone event, amount, and comments.

The final invoice for All Contracts will need to have the "Contract Complete" selection made. And, for project specific preliminary engineering contracts, an invoice submitted at 30%, 60%, or 90% milestones must be identified. If you have 2 or more milestone events, then each will be on separate invoices. If you have questions about your contract, please contact ODOT to find out if you should identify the milestone. Just be aware that any invoice that has a milestone event identified will trigger a performance evaluation by ODOT.



Once you have all of your data entered, click on the Create – Stay Here button to save the invoice record. You will then be presented with the ability to upload attachments that support your invoice as well as enter the detail invoice lines that identify which contract line you are invoicing.

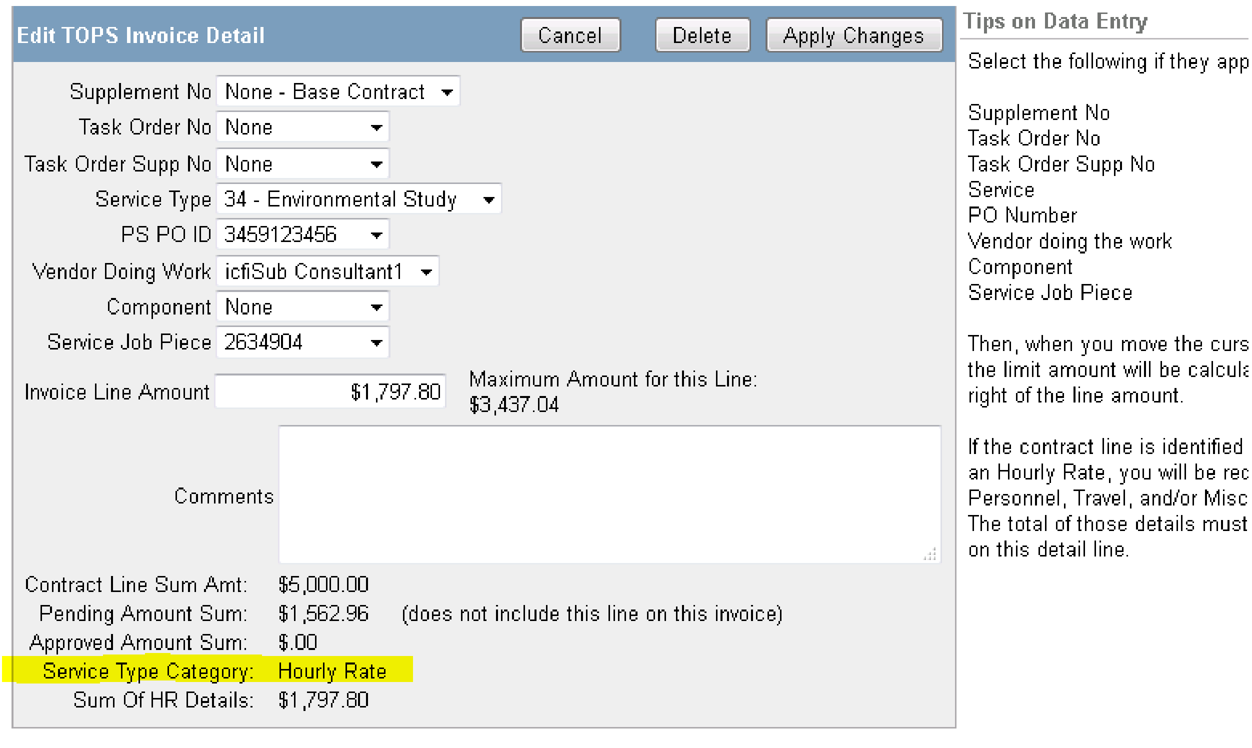
Use the Create button in those regions (attachment or detail line) to bring up the page that allows you to create that specific record. An example of creating an invoice line might look like this page:



This page has a number of drop-down lists that will help you drill down to the specific contract line that you need. Click on those drop-downs starting with the supplement number going down the page. Do NOT skip one of the items – the values that are available below the line you are on are controlled by the value you select. This is called cascading lists-of-values, and will help you make sure you are pointed at the right contract line. Once you select the Service Job Piece, the system has enough information to determine the contract line amount, how much has been previously invoiced for that line, and the remaining balance that is available. This edit should prevent over-billing for a contract line that could prevent your invoice from being processed.

Hourly Rate contract lines

Hourly Rate contract lines are specified in the contract and are billed based on the personnel category listed in attachment B3. This attachment specifies the category and the compensation rate per hour for that category. Invoice lines being entered against one of those contract lines will be further broken down into the personnel category and number of hours to be billed, as well as travel costs associated with the work. Also, there is a miscellaneous charge area that can be used to specify certain charges. If the contract line is identified as Hourly Rate based, the screen will expand to allow these detail charges to be entered.



As can be seen in the image above, this line has been identified as Hourly Rate (as opposed to Lump Sum). This will cause the screen page to expand providing the ability to enter the category and hours, travel costs, and miscellaneous charges.

The following screen shows the page expansion area for category and travel:

Go Actions Create

Edit	EC No	Comments	Created By	Created Date	Updated By	Updated Date	Consultant Doing Work	Start Date Of Work	End Date Of Work	Personnel Category	Total Hours For Period	Hourly Rate Used	Total HR Cost
	0006A	testing	Philip Wallace	22-APR-15	-	-	icfiSub Consultant1	20-APR-15	22-APR-15	Environmental Professional	12	$118.00	$1,416.00
	0006A	-	Philip Wallace	22-APR-15	-	-	icfiSub Consultant1	09-APR-15	09-APR-15	Administrative Assistant	5	$54.00	$270.00
											17		**$1,686.00**

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HR Travel Costs Create

Edit	EC No	Start Date Of Travel	End Date Of Travel	Description	Mileage Claimed	Mileage Rate	Total Mileage Cost	Per Diem	Lodging Amount	Incidental Cost	Total Travel Cost	Comments	Created By	Created Date	Updated By	Updated Date
	0006A	01-APR-15	08-APR-15	testing travel cost	10	$0.58	$5.80	$1.00	$2.00	$3.00	$11.80	testing the travel cost	Philip Wallace	22-APR-15	-	-

As you enter the personnel category data, you will select the timeframe being used, the personnel category (which comes from the B3 provided in the contract), and the number of hours. The hourly rate will be provided for you – it will be the contracted hourly rate.

Invoice Information

EC No	Invoice ID	Invoice Date	Invoice Amt	Vendor Name	Invoice Line No	Supp No	Task Order No	Task Order Supp No	Service	Consultant Doing Work
0006A	0006A-Invoice1	21-APR-15	$2,797.80	Philip Wallace dba ICFI IT Solutions LLC	1	None	None	None	Environmental Study	icfiSub Consultant1

1 - 1

Edit TOPS Invoice Detail Personnel Costs Cancel Delete Apply Changes

Start Date Of Work 20-APR-15 End Date Of Work 22-APR-15

Personnel Category Environmental Professional

Total Hours For Period 12

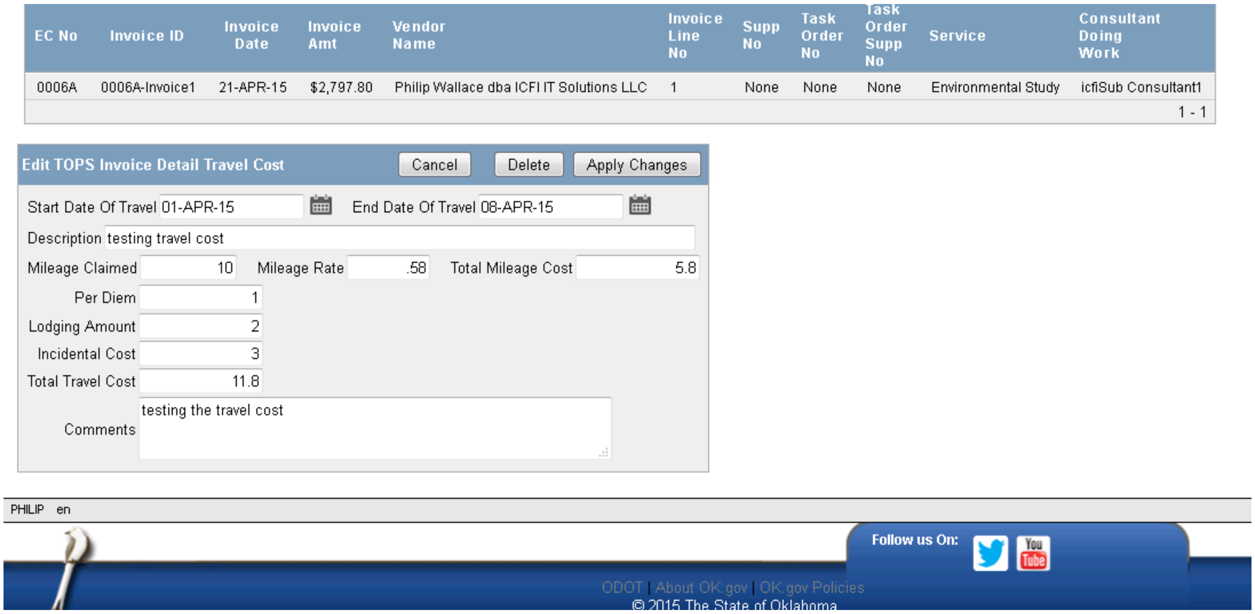
Hourly Rate: $118.00 Total Cost: $1,416.00

Comments testing

HR Record Sets

Consultant Name	Effective Date	Personnel Category	Total Hourly Rate
icfiSub Consultant1	07-MAY-15	Project Manager	$125.00
icfiSub Consultant1	02-APR-15	Project Manager	$125.00
icfiSub Consultant1	02-APR-15	Program Manager	$132.00
icfiSub Consultant1	07-MAY-15	Program Manager	$132.00
icfiSub Consultant1	02-APR-15	Hydraulic Engineer	$102.00
icfiSub Consultant1	07-MAY-15	Hydraulic Engineer	$102.00
icfiSub Consultant1	02-APR-15	Environmental Professional	$118.00
icfiSub Consultant1	07-MAY-15	Environmental Professional	$118.00

The travel cost page is to be used to provide details for all travel related expenses:



EC No	Invoice ID	Invoice Date	Invoice Amt	Vendor Name	Invoice Line No	Supp No	Task Order No	Task Order Supp No	Service	Consultant Doing Work
0006A	0006A-Invoice1	21-APR-15	$2,797.80	Philip Wallace dba ICFI IT Solutions LLC	1	None	None	None	Environmental Study	icfiSub Consultant1

1 - 1

Edit TOPS Invoice Detail Travel Cost — Cancel | Delete | Apply Changes

Start Date Of Travel: 01-APR-15 End Date Of Travel: 08-APR-15
Description: testing travel cost
Mileage Claimed: 10 Mileage Rate: .58 Total Mileage Cost: 5.8
Per Diem: 1
Lodging Amount: 2
Incidental Cost: 3
Total Travel Cost: 11.8
Comments: testing the travel cost

PHILIP en

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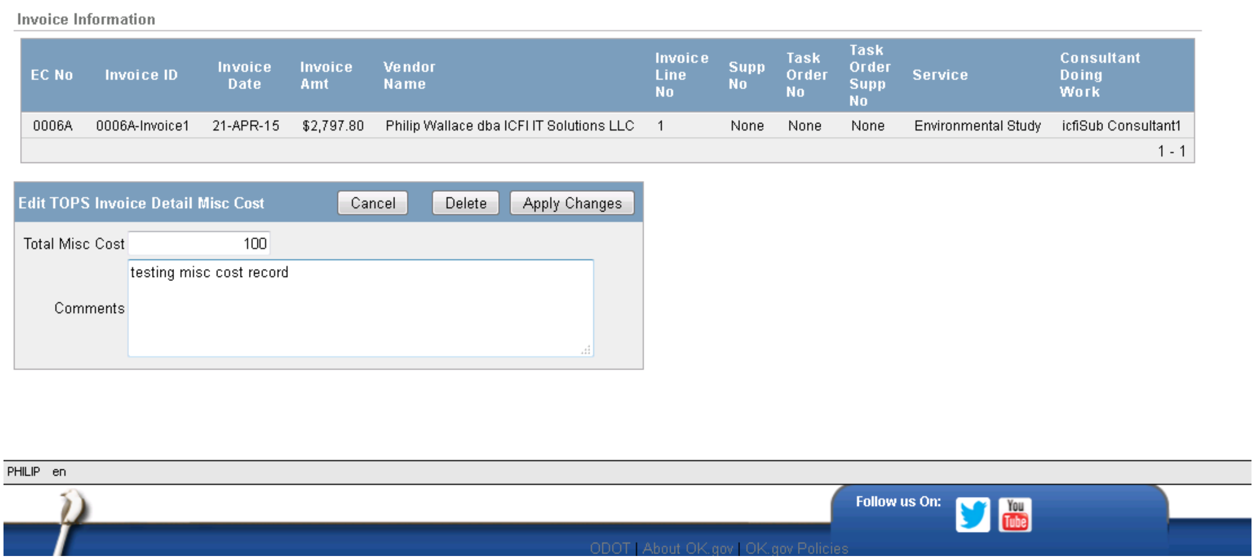
And, the miscellaneous cost page allows you to enter charges that are not personnel or travel:



Invoice Information

EC No	Invoice ID	Invoice Date	Invoice Amt	Vendor Name	Invoice Line No	Supp No	Task Order No	Task Order Supp No	Service	Consultant Doing Work
0006A	0006A-Invoice1	21-APR-15	$2,797.80	Philip Wallace dba ICFI IT Solutions LLC	1	None	None	None	Environmental Study	icfiSub Consultant1

1 - 1

Edit TOPS Invoice Detail Misc Cost — Cancel | Delete | Apply Changes

Total Misc Cost: 100
Comments: testing misc cost record

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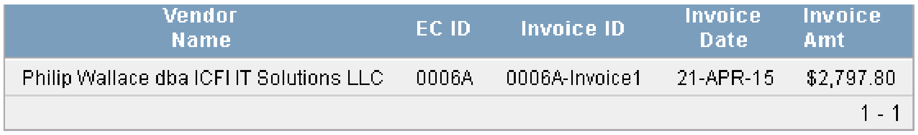
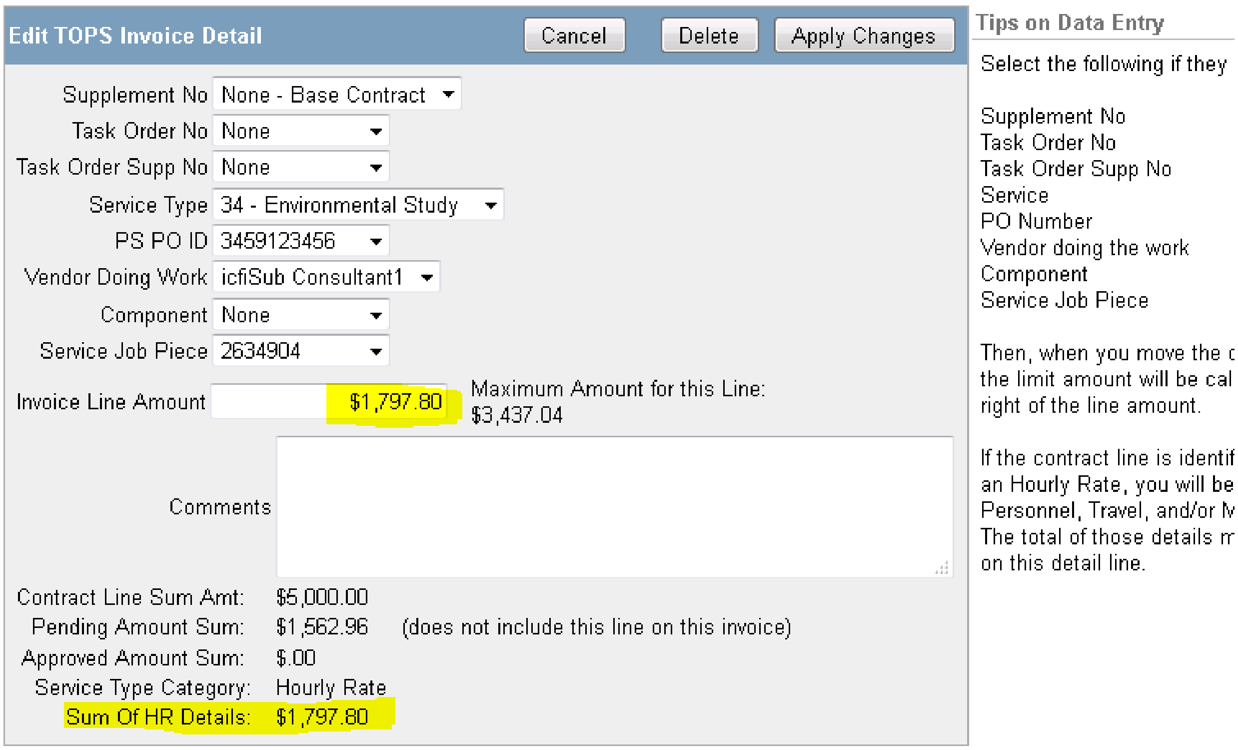
Once you have entered all of the detail cost lines, you must make sure the invoice line amount matches the total of all the details. The system shows the calculated total amount, but you have to enter the amount in the invoice line area. This ensures that you have verified that all detail lines were entered.



Vendor Name	EC ID	Invoice ID	Invoice Date	Invoice Amt
Philip Wallace dba ICFI IT Solutions LLC	0006A	0006A-Invoice1	21-APR-15	$2,797.80
				1 - 1



Edit TOPS Invoice Detail

Cancel | Delete | Apply Changes

Supplement No: None - Base Contract
Task Order No: None
Task Order Supp No: None
Service Type: 34 - Environmental Study
PS PO ID: 3459123456
Vendor Doing Work: icfiSub Consultant1
Component: None
Service Job Piece: 2634904
Invoice Line Amount: $1,797.80 — Maximum Amount for this Line: $3,437.04
Comments:

Contract Line Sum Amt: $5,000.00
Pending Amount Sum: $1,562.96 (does not include this line on this invoice)
Approved Amount Sum: $.00
Service Type Category: Hourly Rate
Sum Of HR Details: $1,797.80

Tips on Data Entry

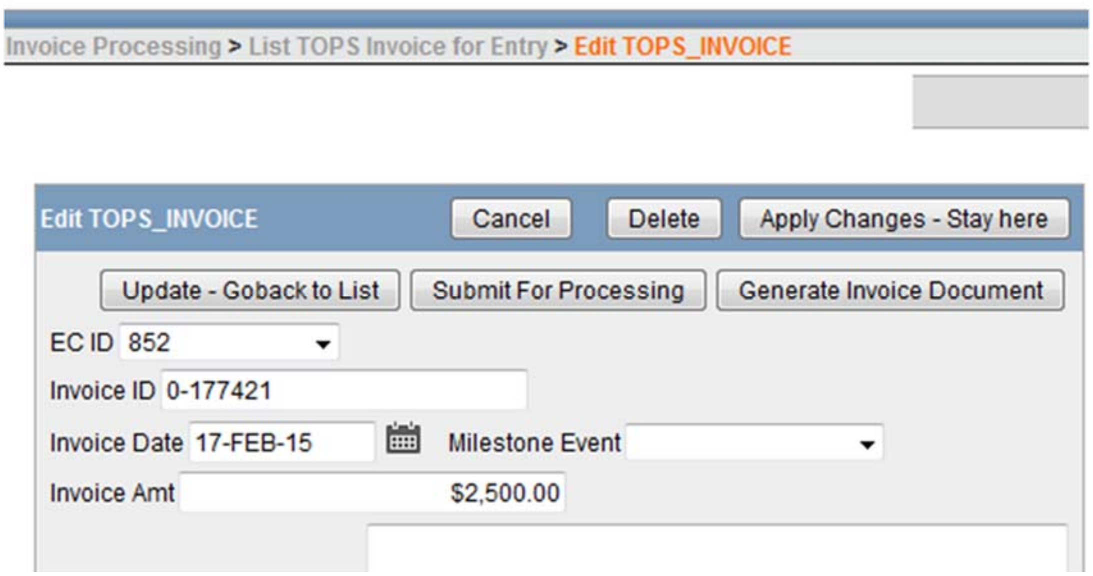
Select the following if they

Supplement No
Task Order No
Task Order Supp No
Service
PO Number
Vendor doing the work
Component
Service Job Piece

Then, when you move the c
the limit amount will be cal
right of the line amount.

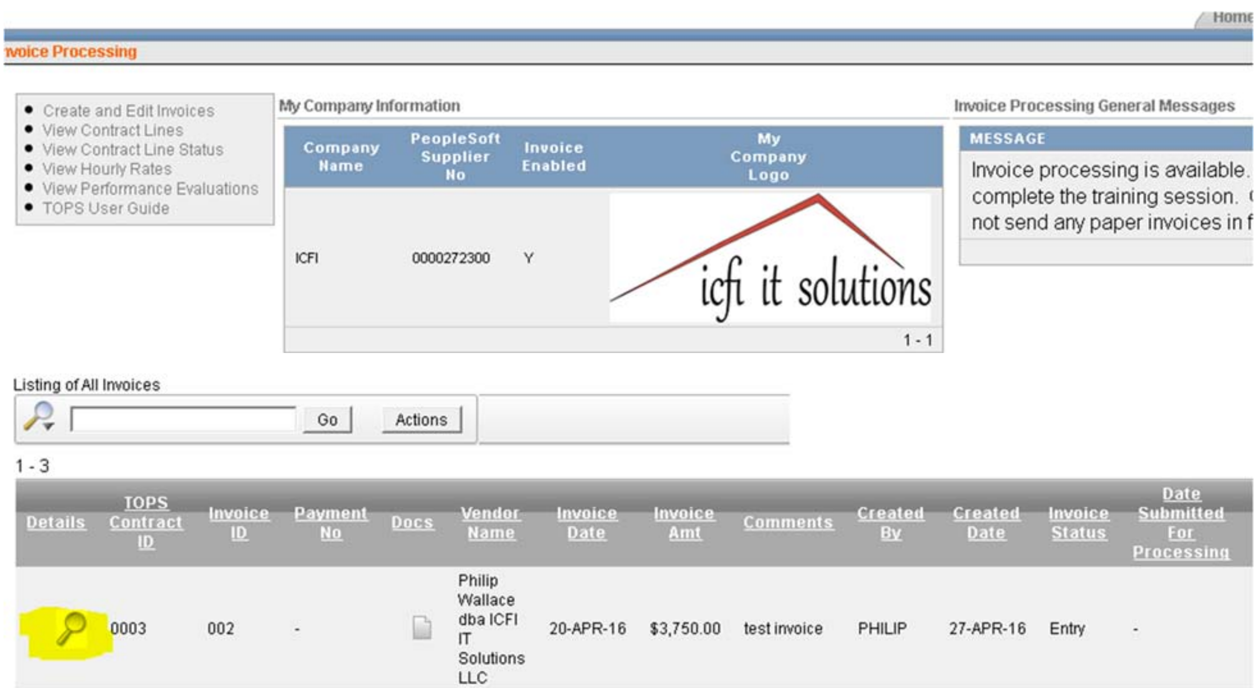
If the contract line is identif
an Hourly Rate, you will be
Personnel, Travel, and/or M
The total of those details m
on this detail line.

Enter all of your invoice lines, one at a time. As you save them, the system will provide a list on the invoice page so you can see that they exist. Once you have all of the lines entered and the sum of the detail lines matches the amount of the invoice, a new button will become active that will let you Submit the invoice for processing. Make sure you have all attachments uploaded and all detail lines entered before you click on the Submit button. Once you click it, the invoice moves out of the "Entry" phase into the "Submitted" phase and you will no longer be able to modify it. But, if you do fail to include something, ODOT personnel can return the invoice to the "Entry" phase to allow you to continue working with the data and re-submit it for processing. Also, you will notice that there is a button that will generate the invoice document in pdf form. This allows you to create a copy of the data that you are going to submit – but make sure you generate it prior to clicking on the submit button.

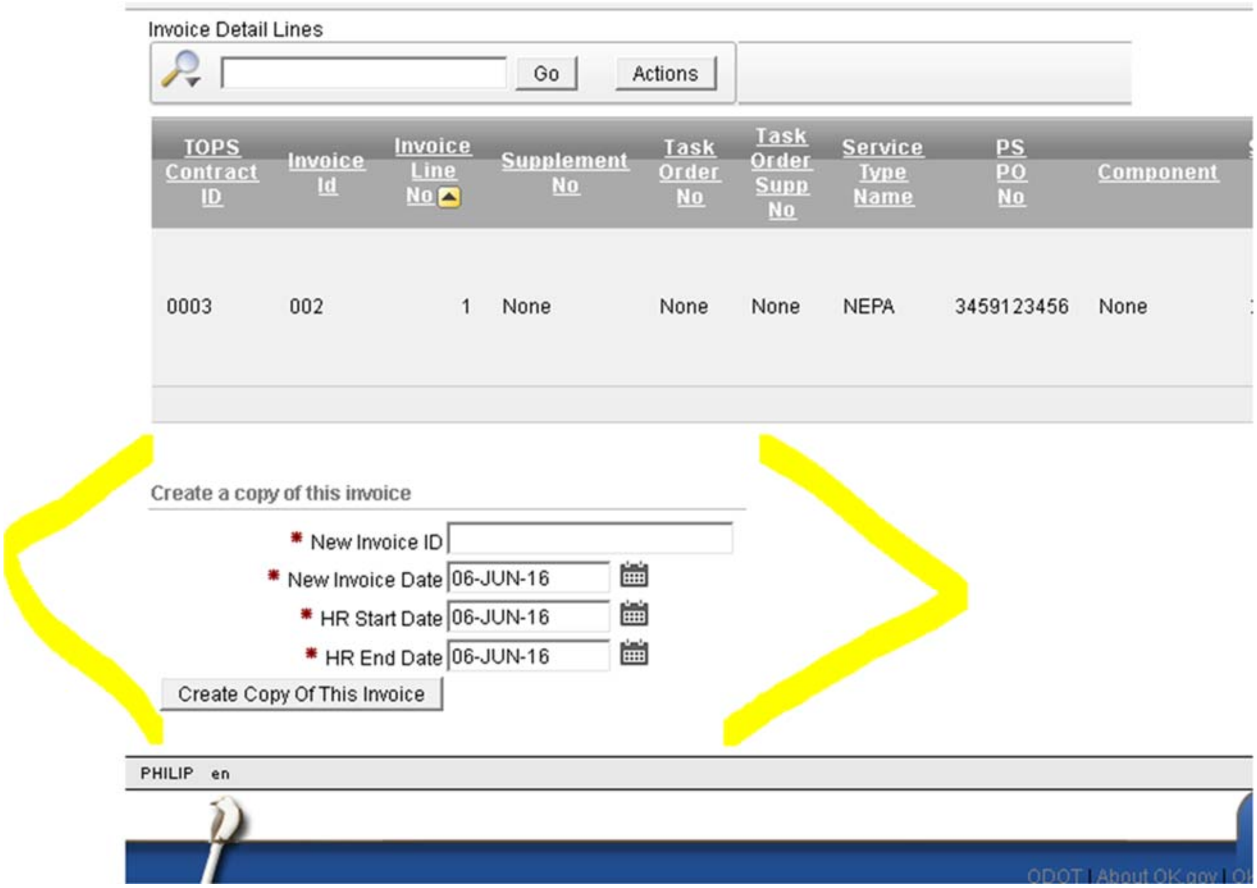


Copy an existing invoice to a new invoice

Invoices that have Hourly Rate lines can be quite tedious to enter if there are many personnel category records. So, in order to help the user, the ability to copy an existing invoice to a new one has been added. You must be on the main invoice page in the invoice tab to get a list of all invoices (if the one you want to use as your source is not in the entry phase, this will be the only place to view it). Select the invoice you want to use as the source data:



Then, scroll to the bottom of the page and provide the new invoice data:



Once you have done this, you must return to the page where you can edit the new invoice.

Tracking the status of your invoice

TOPS invoice processing gives you a way to track your invoice as it moves through the system. Use the invoice processing main menu page along with the "gray bar" section of the list of invoices. Remember that the gray bar provides you with a way to query the records to find the specific set of data you are looking for. Simply click on the column header in the bar to activate features to assist you in your search. This is an example of looking at the invoice status (phase):

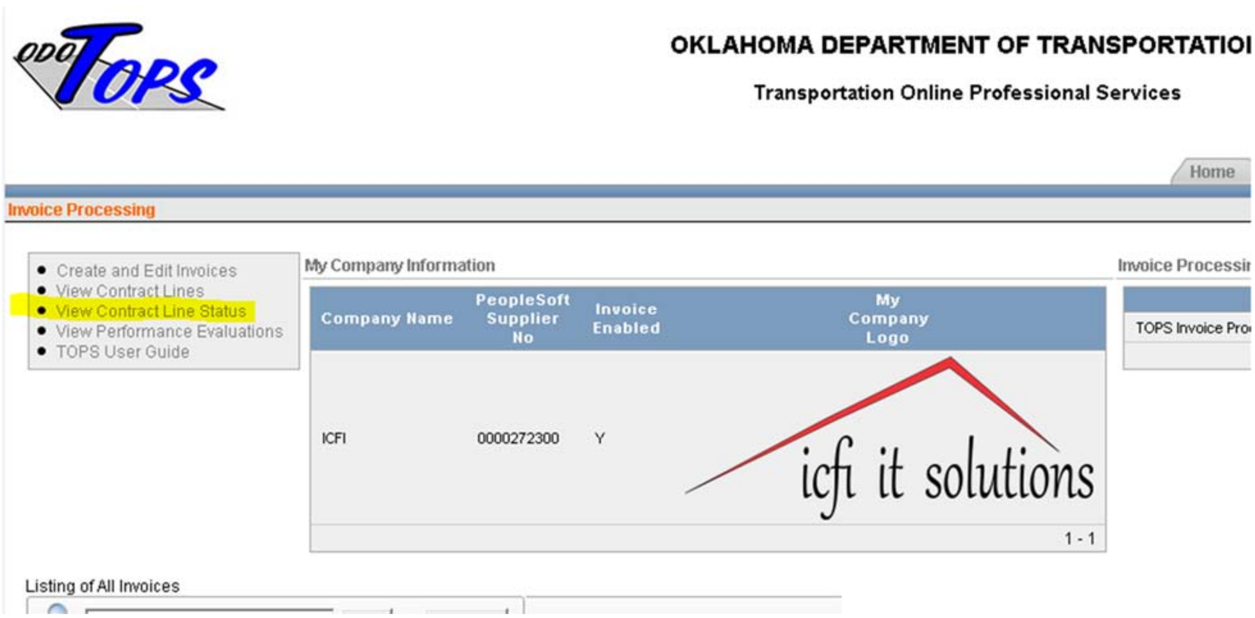
The invoice typically moves through these phases (status):

1) Entry
2) Submitted
3) In Process (review has started)
4) Approved (for payment processing)
5) Paid

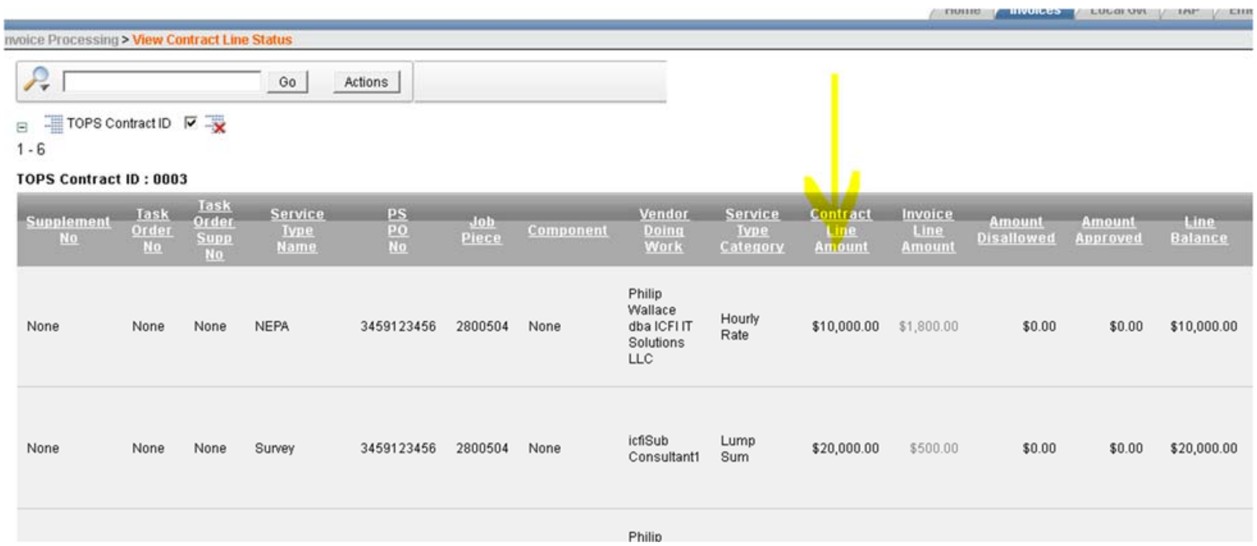
Also, you should notice that there is an icon on the left that will let you see the details associated with the invoice, and another one under the Docs heading. This icon will let you view the attachments that were uploaded for the invoice.

Contract Line Status

In order to take maximum advantage of the ability of TOPS to speed up invoice processing, it is best to verify the contract line status before you begin working in this part of the system. As new contracts start and all invoices are entered thru the system, the contract line balances will be kept in sync. For older contracts, there could be significant work involved in making sure the historical invoice claim data is correct. Users need to be familiar with the menu option for viewing the contract line status.



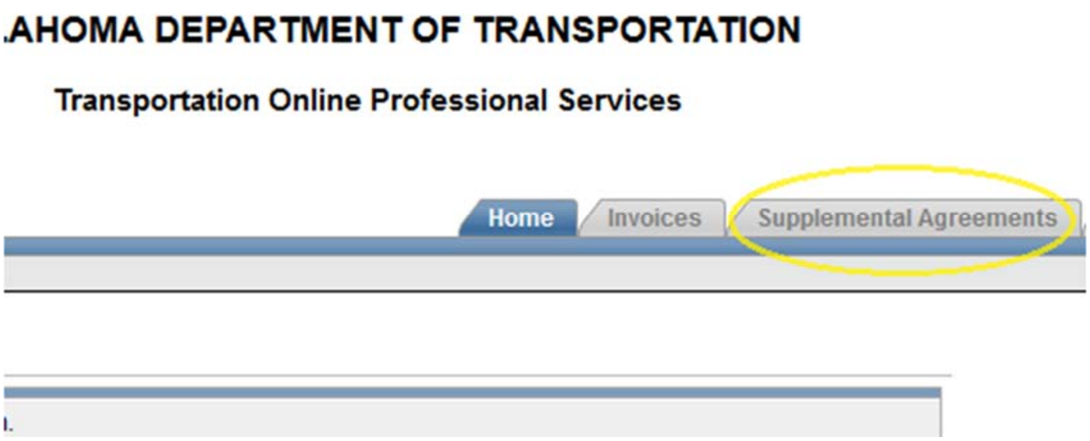
This option uses the interactive report that provides the user a lot of search and filtering capability. Look for the specific contract that you are managing, and then view each of the contract lines. You can see the contract amount, invoice amount, amount approved for payment, as well as the contract line balance. The invoice amount is a link that will show you each invoice where the specified contract line was included.



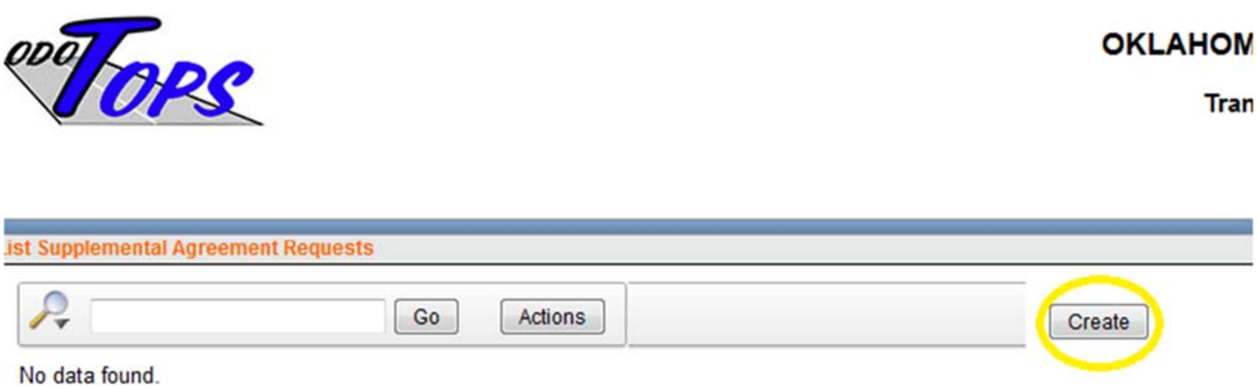
Make sure you review each line on your contract to see that it matches what you have in your records. The goal is to ensure that all historical invoices were entered correctly so all future invoices can be processed with minimal problems.

Supplemental Agreement Processing

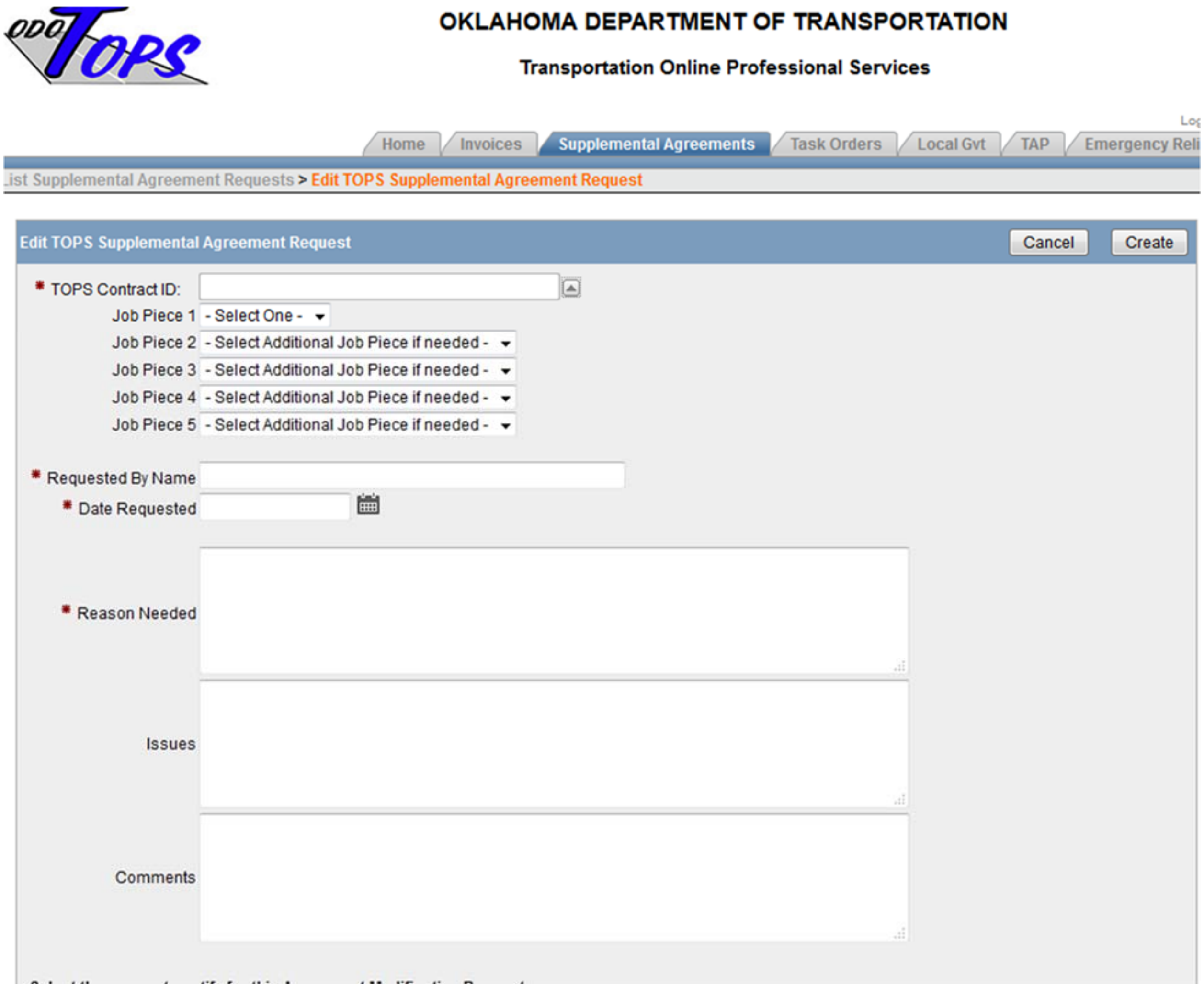
In order to streamline the process for requesting a supplemental agreement, TOPS provides a tab and pages that allow the consultant to enter the request. Click on the tab in the top portion of the screen:



Use the Create button to start the process of entering the information needed to initiate the agreement request:

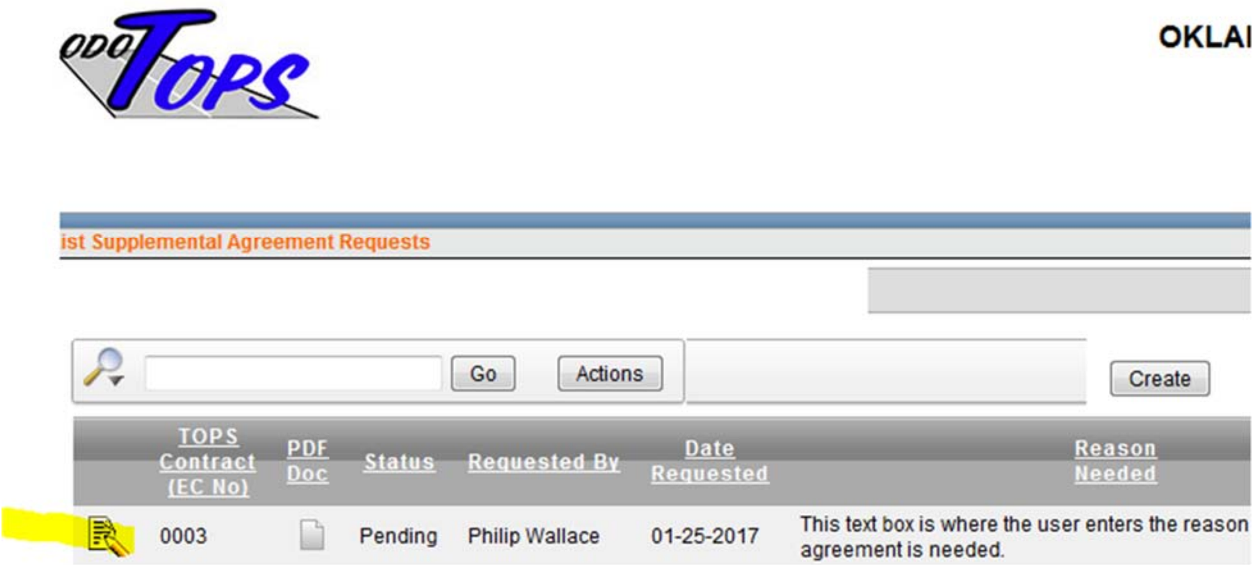


The page that opens provides the data fields that are needed. Select your Contract ID from the drop-down list, and then select all of the job piece numbers that are associated with the request. Enter the person's name making the request, the date, and the reason the modification is needed. If necessary, enter any additional information in the Issues and Comments text boxes.

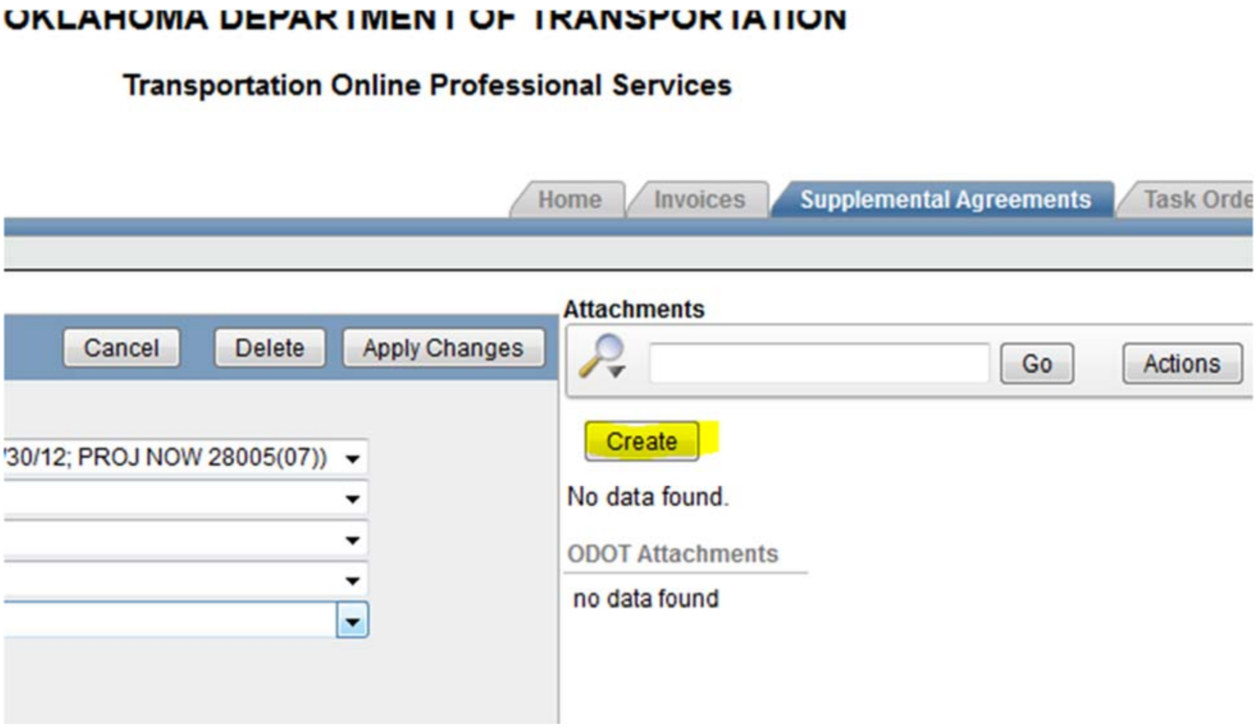


Once you have entered this information, you should use the Create button to save your request. This saves the data for the request record.

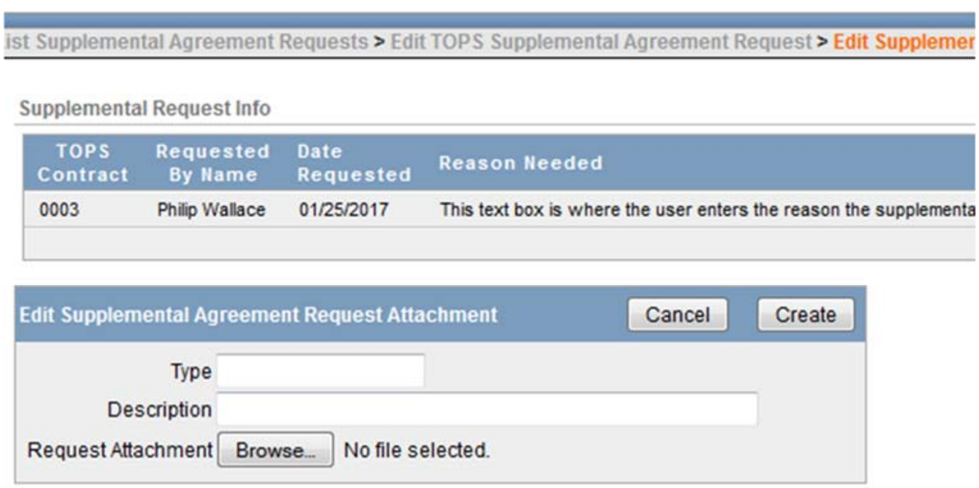
The system provides a way for the consultant and ODOT to upload attachments that provide further documentation about the request. In order to upload files, you must be on the edit page for the request record. If you are on the page that shows the list of your requests, use the edit icon on the left end of the record for your specific request:



This takes you to the edit page, and on the right side of the page is the area where you can upload attachments.   Click on the Create button to go to the page where you create the attachment record:

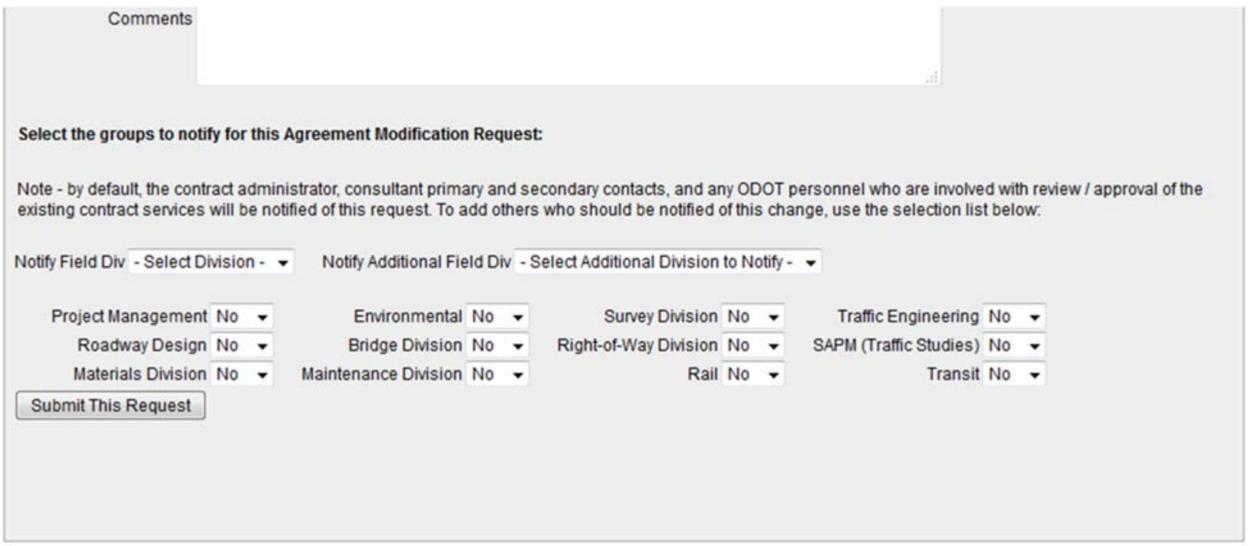


Provide a short descriptive document type entry, and a description of what the document is. Then browse to your file and select it via the browse button.   Once you have it identified, use the Create button to create your attachment in the system.



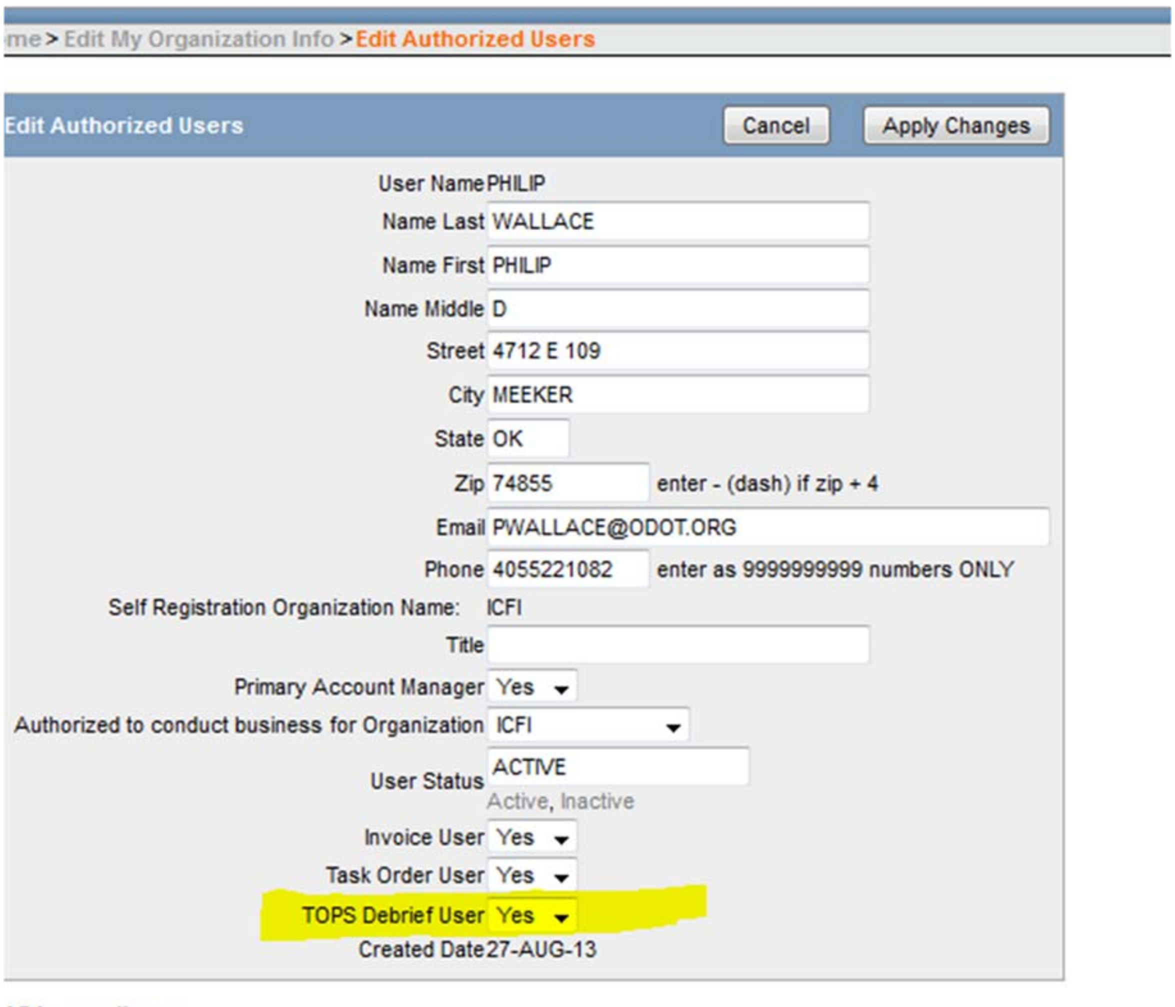
You can upload multiple attachment documents for the request.

Once you have all of your documents in the system, you need to provide the dditional information on the screen that identifies the various groups within the department who will receive an email notification when you submit your request.   Make sure to identify the Field Division(s) that need to be aware of the change, along with any of the central office divisions that should be involved.   Once you have all of them selected, then you can use the Submit This Request button to send the email messages.



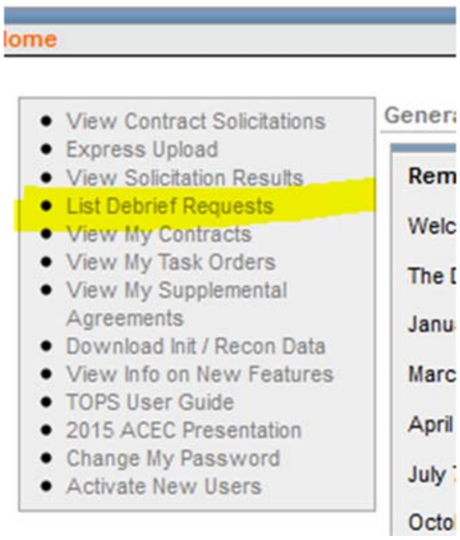
Solicitation Debrief Request

Companies can request debrief meeting via a feature that identifies the solicitation and contract. In order to use this, the Primary Account Manager must edit the users authorized to do business for the organization. There, a data value can be set to the value of "Yes" which allows the system to display a navigation link for that specific user to access the pages to request the meeting. The user edit page looks like this image:

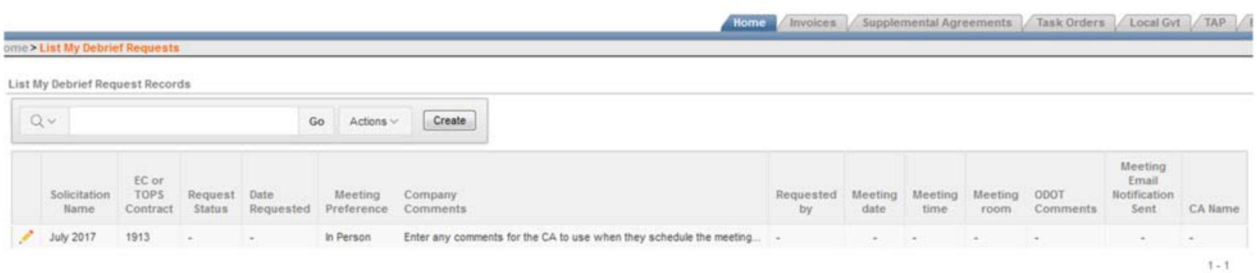


Note – you must establish the user authorization before the rest of the system processing is available for the user.

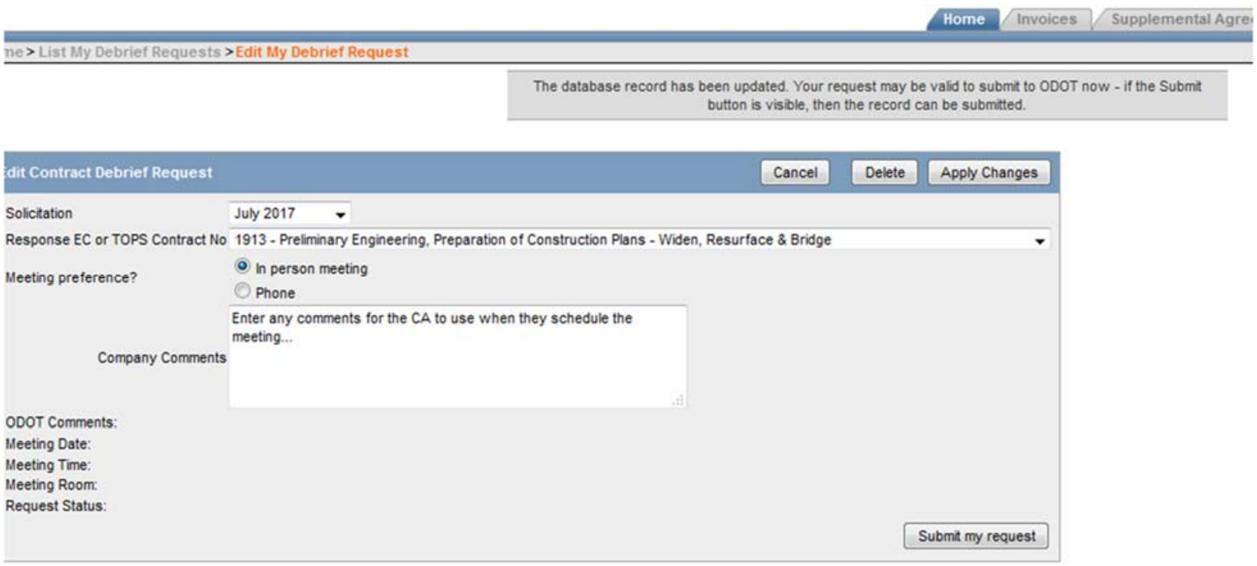
A new navigation link will become available for users who can participate in the debrief meeting pages:



The link brings up a page that shows the request records in the system. From that page, use the Create button to establish a new request record in the database:



Use the drop-down lists to select the contract you are requesting the meeting to be held. Identify if you need an in-person meeting or if a phone meeting is sufficient. Once you get the data entered, click on the button to create the record. Once you do this, a message is displayed at the top of the page that instructs you to then use the Submit button to send the request to the Contract Administrator:

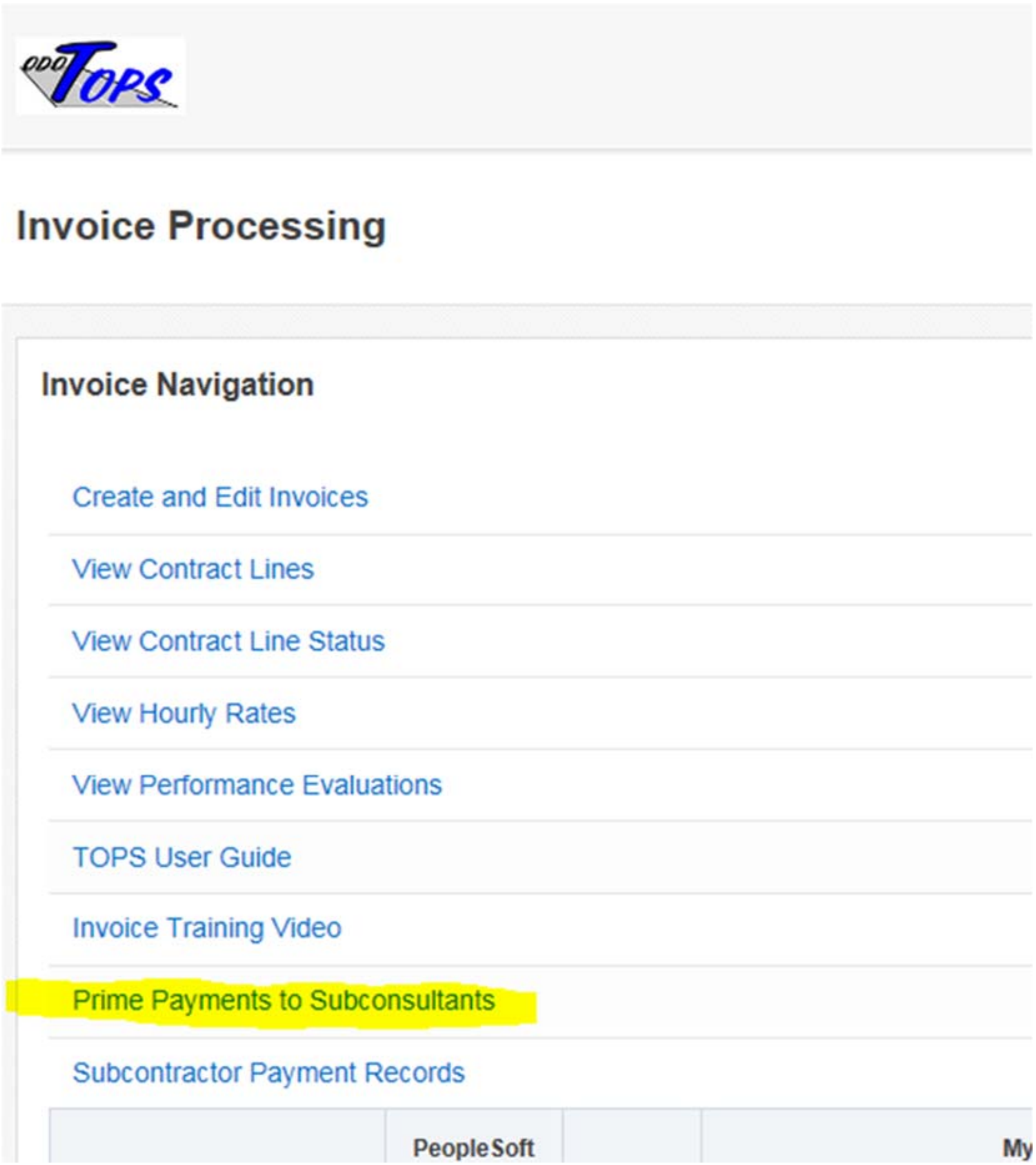


You should receive an email as the request is submitted. Also, once the Contract Administrator works the request and establishes a meeting, you will receive another email with the information. And, the request record is updated with the pertinent data so you can use the record itself as a way to stay informed as to the status of the request.

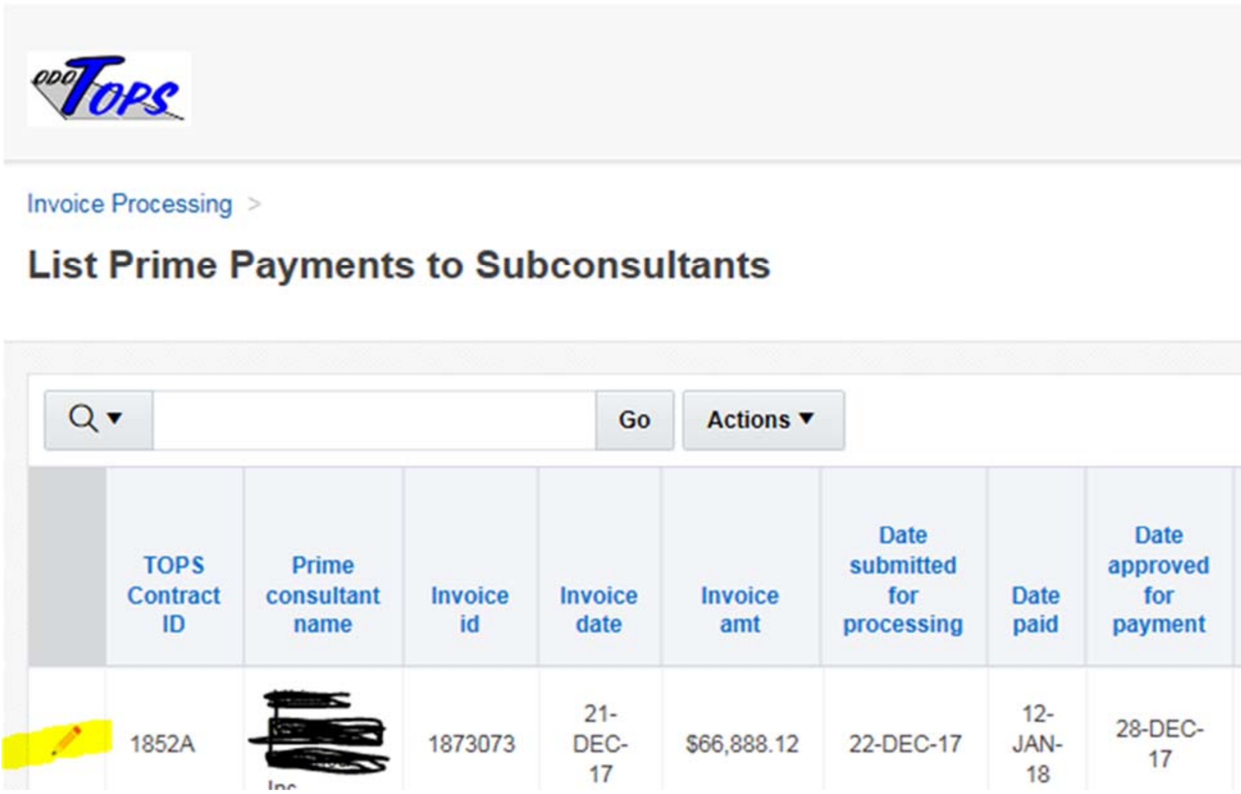
Prime Contractor Payments to Subcontractors - Payment Verification

In order to allow subcontractors to verify that they have been paid according to the provisions set forth for the subcontractor payments, a page set is available for the prime to enter the date and amount that the subcontractor is paid.

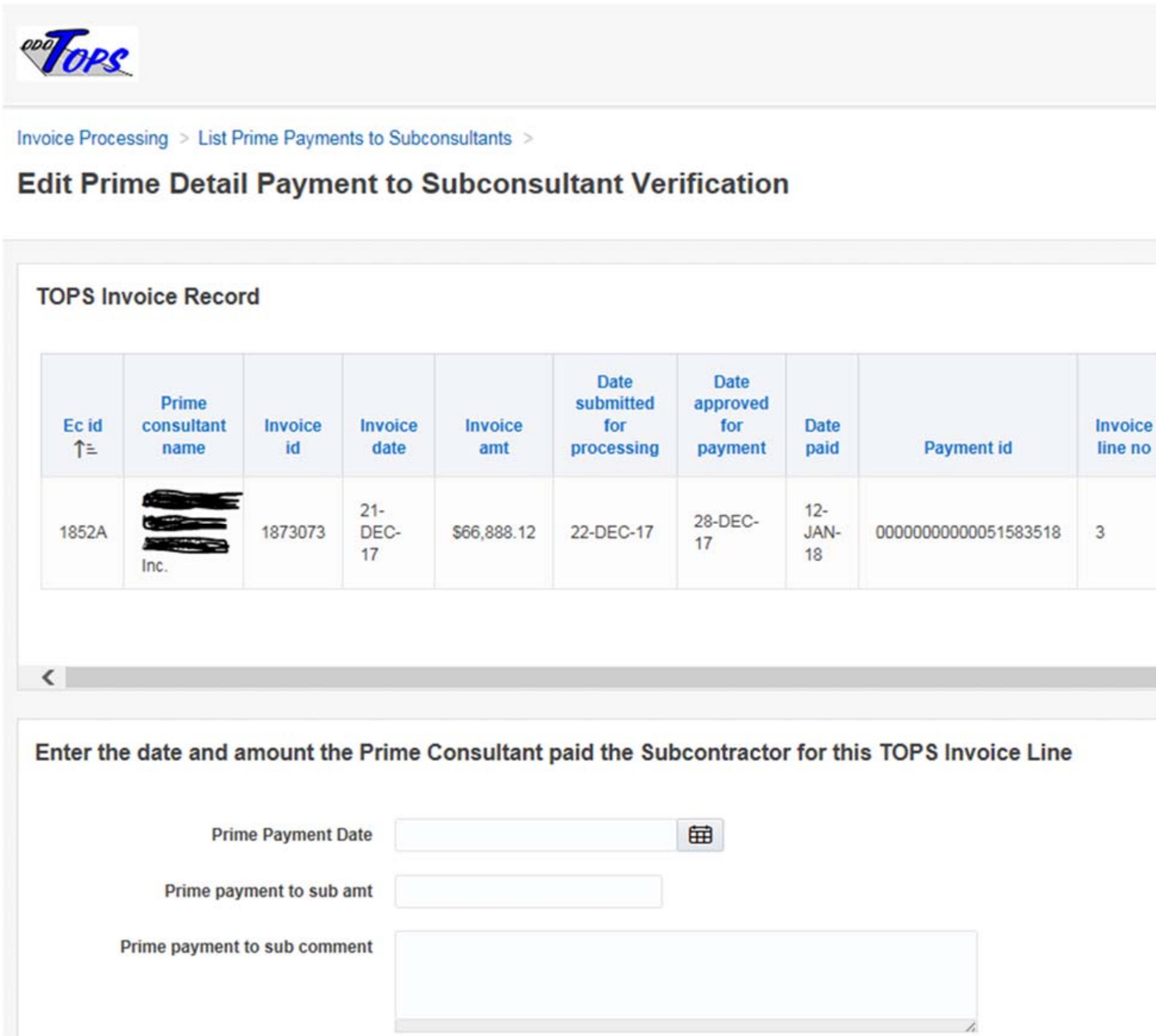
The option to perform this task is available from the Invoice menu page:



After selecting that menu option, the user is presented with a list of payment records that the system collects and makes available. Use the search / filtering features to find the payment record, then use the edit icon to bring up the page that allows you to enter the date the subcontractor was paid along with the amount. Also, appropriate comments can be entered that provides any additional documentation needed.



Once the data is entered, use the Save (Apply changes) button to save the information.



Invoice Processing > List Prime Payments to Subconsultants >

Edit Prime Detail Payment to Subconsultant Verification

TOPS Invoice Record

Ec id	Prime consultant name	Invoice id	Invoice date	Invoice amt	Date submitted for processing	Date approved for payment	Date paid	Payment id	Invoice line no
1852A	[redacted] Inc.	1873073	21-DEC-17	$66,888.12	22-DEC-17	28-DEC-17	12-JAN-18	00000000000051583518	3

Enter the date and amount the Prime Consultant paid the Subcontractor for this TOPS Invoice Line

Prime Payment Date

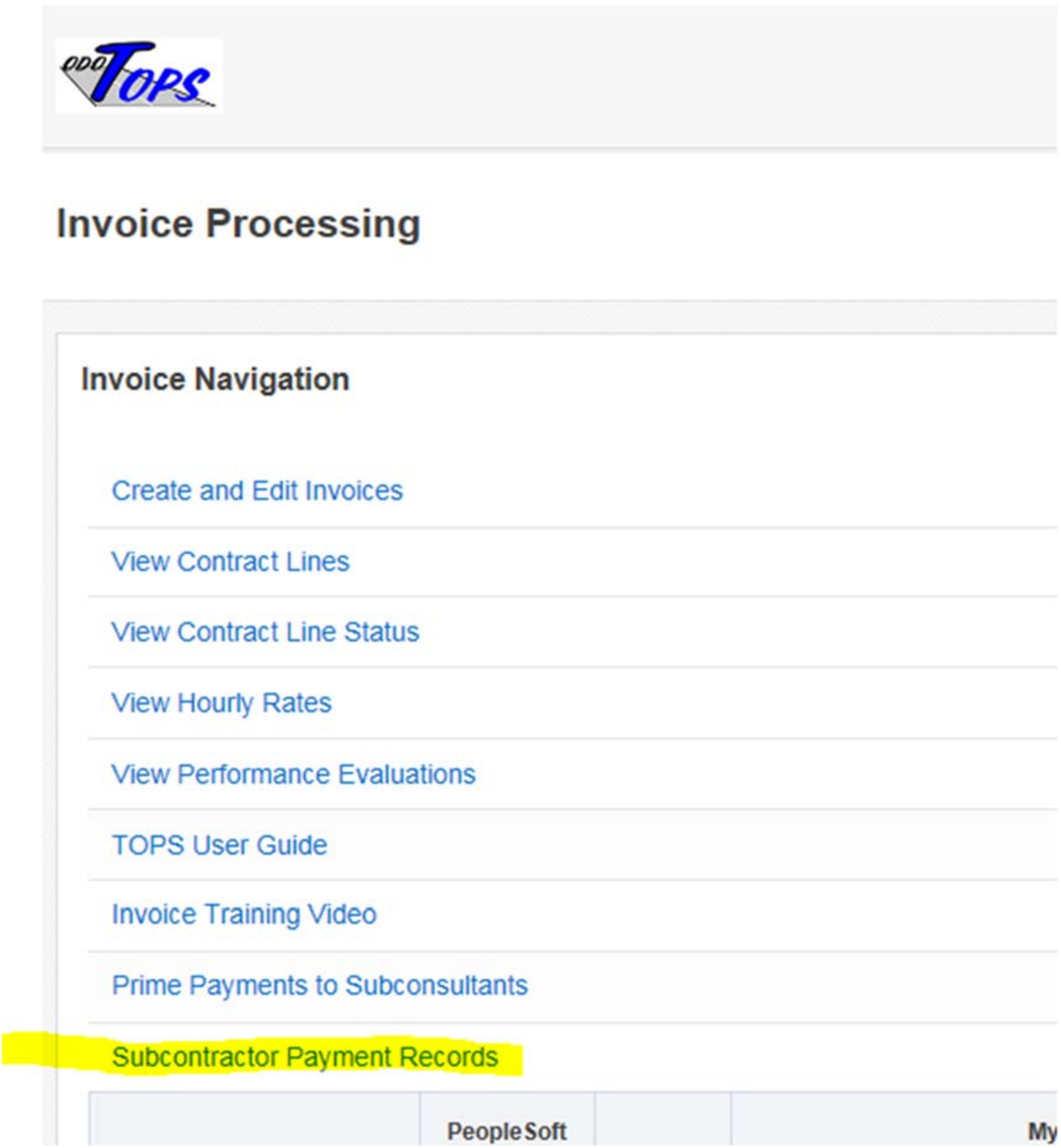
Prime payment to sub amt

Prime payment to sub comment

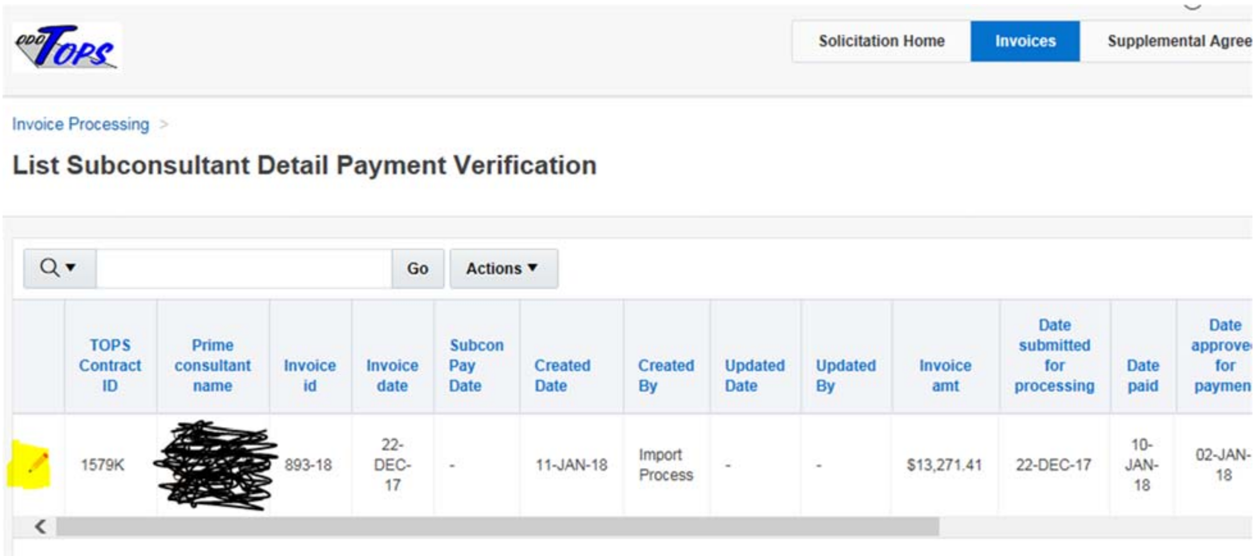
Subcontractor Payment Verification

In order to allow subcontractors to verify that they have been paid according to the provisions set forth for the subcontractor program, a page set is available for the subcontractor (or sub-consultant) to use for the entry of the date they are paid by the prime contractor. In order to get to this page, the user must be set up as an Subcon Entry User.

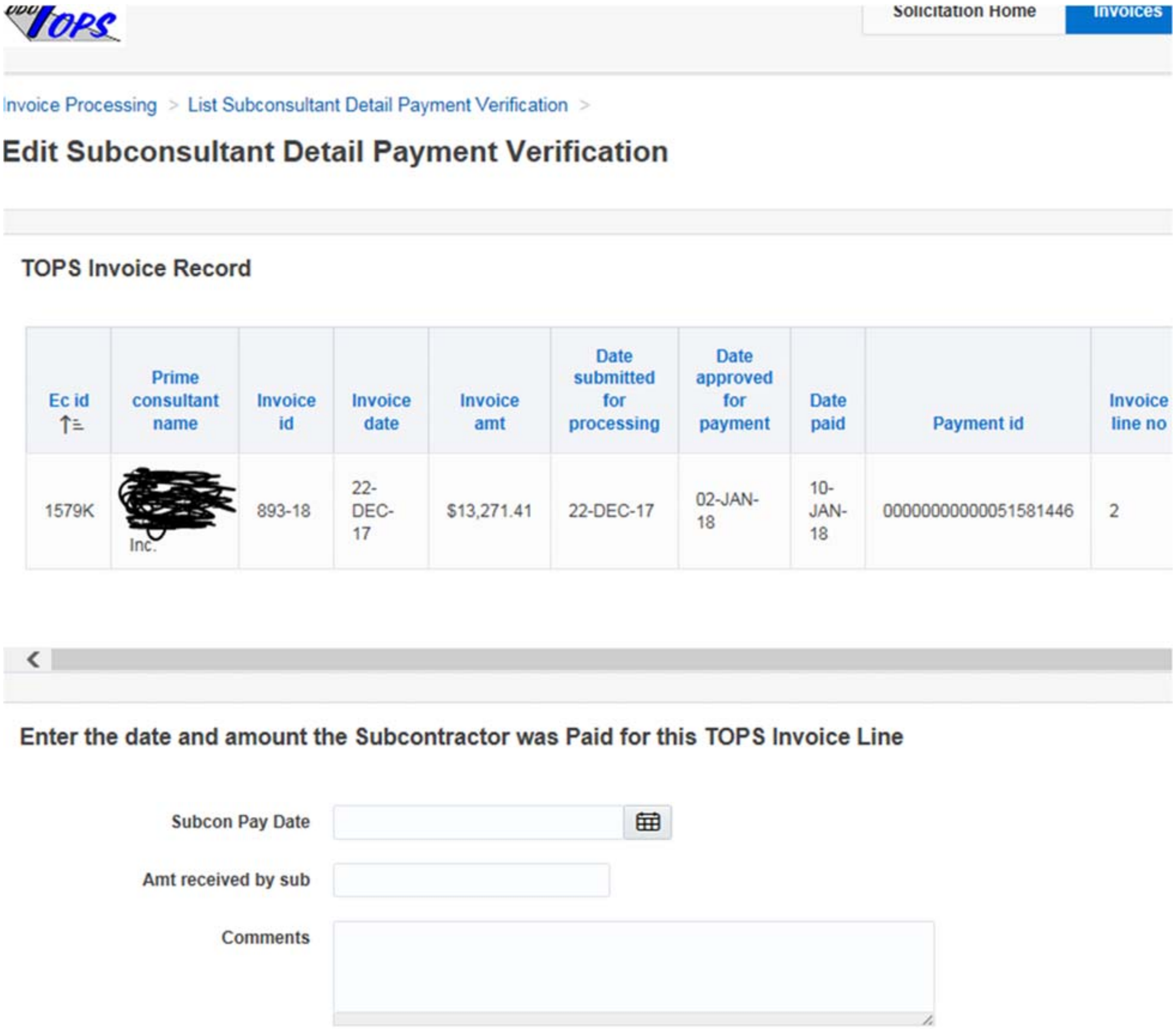
The option to perform this task is available from the Invoice menu page:



After selecting that menu option, the user is presented with a list of payment records that the system collects and makes available. Use the search / filtering features to find the payment record, then use the edit icon to bring up the page that allows you to enter the date the subcontractor was paid along with the amount. Also, appropriate comments can be entered that provides any additional documentation needed.



Once the data is entered, use the Save (Apply changes) button to save the information.



Solicitation Home | Invoices

Invoice Processing > List Subconsultant Detail Payment Verification >

Edit Subconsultant Detail Payment Verification

TOPS Invoice Record

Ec id	Prime consultant name	Invoice id	Invoice date	Invoice amt	Date submitted for processing	Date approved for payment	Date paid	Payment id	Invoice line no
1579K	[redacted] Inc.	893-18	22-DEC-17	$13,271.41	22-DEC-17	02-JAN-18	10-JAN-18	00000000000051581446	2

Enter the date and amount the Subcontractor was Paid for this TOPS Invoice Line

Subcon Pay Date

Amt received by sub

Comments

When the Prime consultant has been paid by the Department for services your firm has performed, you will receive an email.

All Unread | Search Current Mailbox (Ctrl+E) | Current Mailbox

FROM	RECEIVED	SUBJECT
TOPS@odot.org	Fri 2/1/2019 6:51 AM	TOPS sub consultant prompt payment

A new payment record was processed for an invoice where TOPS indicates your firm is a sub consultant. ODOT requires that you

A new payment record was processed for an invoice where TOPS indicates your firm is a sub consultant. ODOT requires that you be paid within 15 days of the prime payment.

The payment information is shown below. TOPS provides you with a way to report the payment to your firm. Please use the system to enter the requested info.

Sub consultant name is: icfiSub Consultant2

Prime consultant name: Philip Wallace dba ICFI IT Solutions LLC

Contract ID: 0003T
Invoice ID: 12345 line no: 1
Invoice Date: 2017/08/01
Payment Date: 2019/01/25
Contract service type name is: Right-of-Way Survey
Payment amount: $5.00
Amount Disallowed: $95.00
Reason disallowed: Disallowed amount for testing / training Date due to sub consultant: 2019/02/09

Use this link to log in to TOPS: https://biappsrv.odot.ok.gov/apex/f?p=750:651

If you have questions or need assistance, please contact Brad Smith at btsmith@odot.org or call 405-521-2451

Please do NOT reply to this email. It is an unmonitored email address.