TRANSPORTATION POOLED FUND PROGRAM

Transportation Pooled Fund Website
Authorized User Help Manual

March 2019

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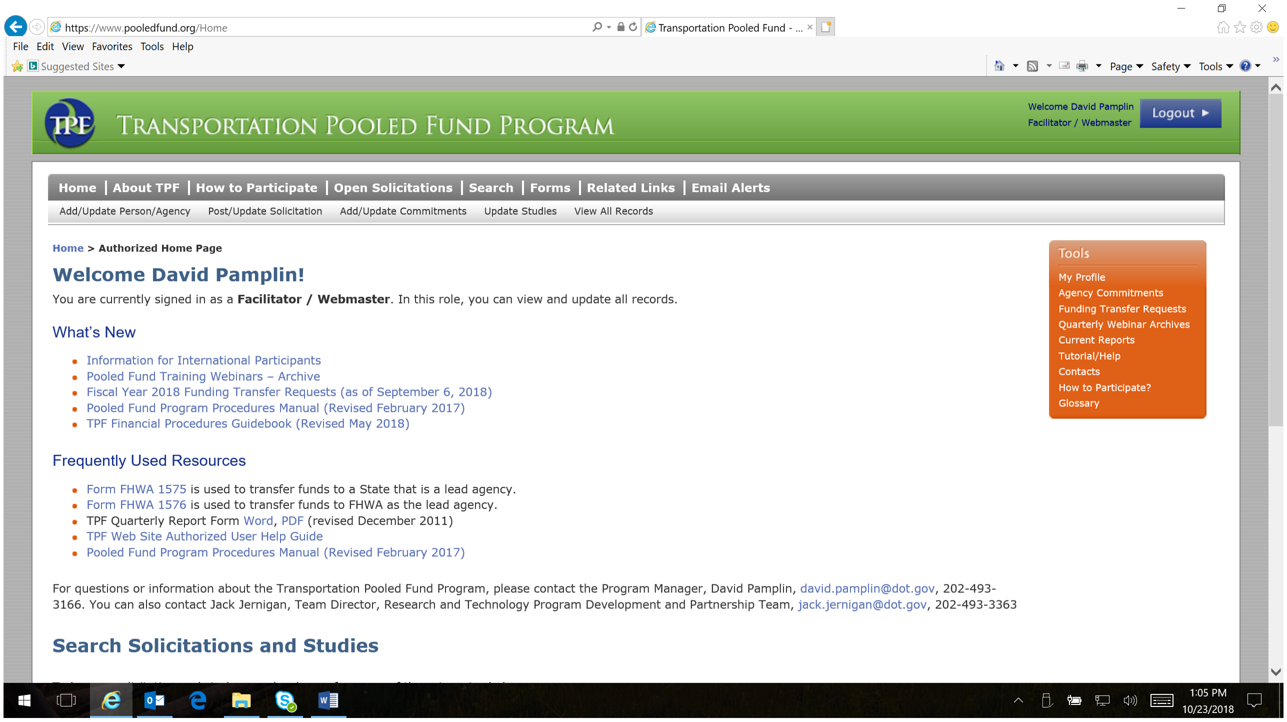
Purpose

The purpose of this document is to provide the transportation pooled fund website authorized users with instructions for navigating through the many functions of the website. There are many functions that authorized users must be able to perform to carry out their duties as a lead agency contact, agency financial contact", and other delegated duties. Knowledge of the functions of the website will ensure project information is kept up to date and project information is correct.

Once Logged into the TPF Web Site, You Navigate from the "Home Page"



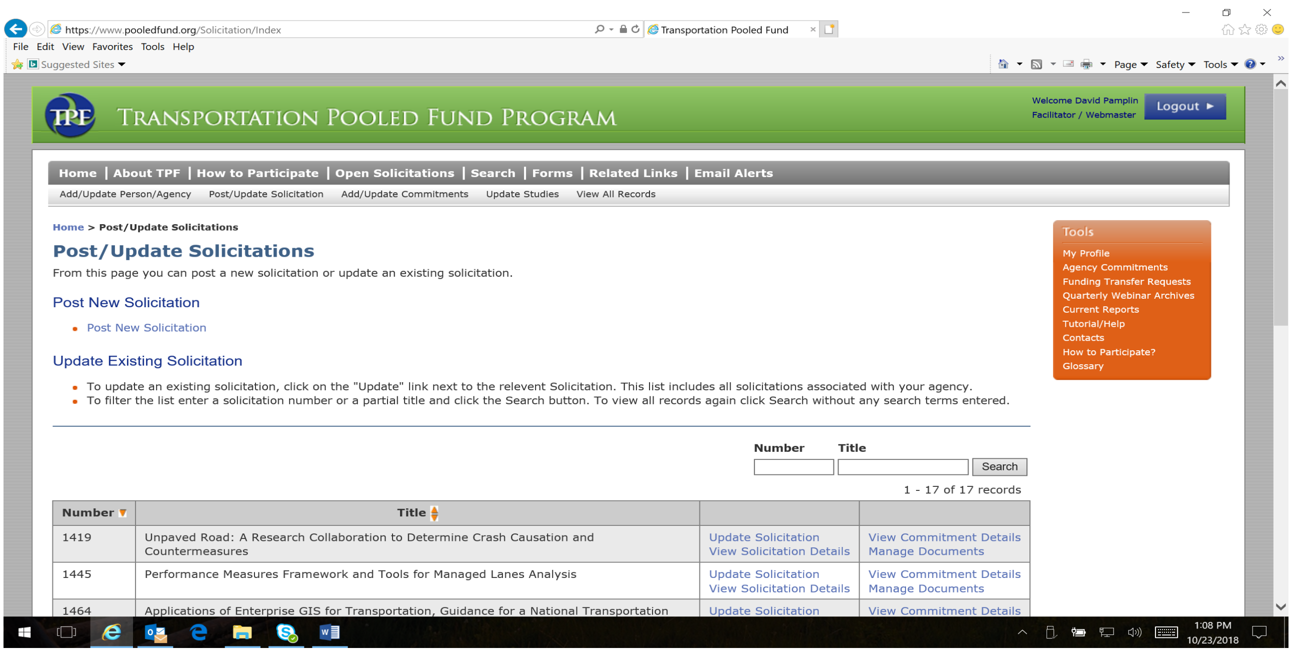
From this "Home Page", you can navigate to any page/option listed in the "Two Menu Bars" at the top of the "Home Page" or any of the options in the "Orange Tools Box" on the right side of the "Home Page". You can also open any option listed on the "Home Page" under "What's New" and "Frequently Used Resources".

How to Post a New Solicitation or Manage an Existing Solicitation?

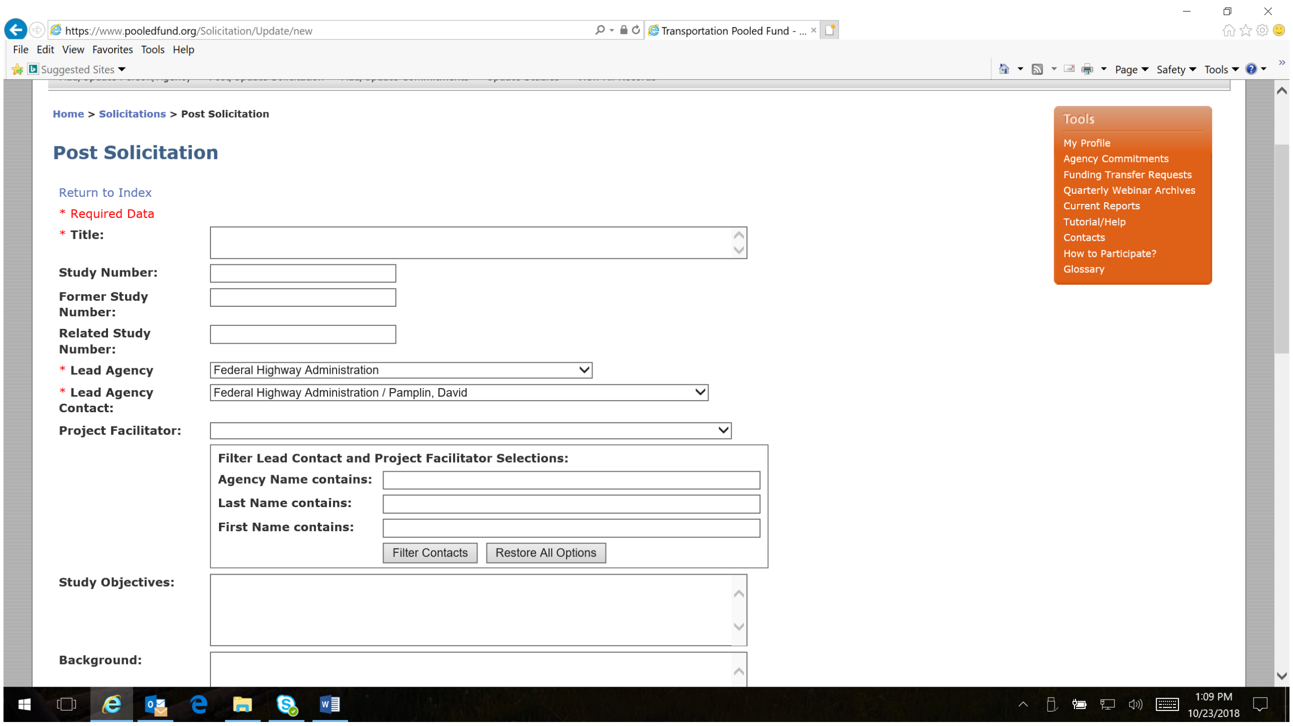
Lead Agency Contacts have the ability to post new solicitations and update existing solicitations.

Posting a New Solicitation

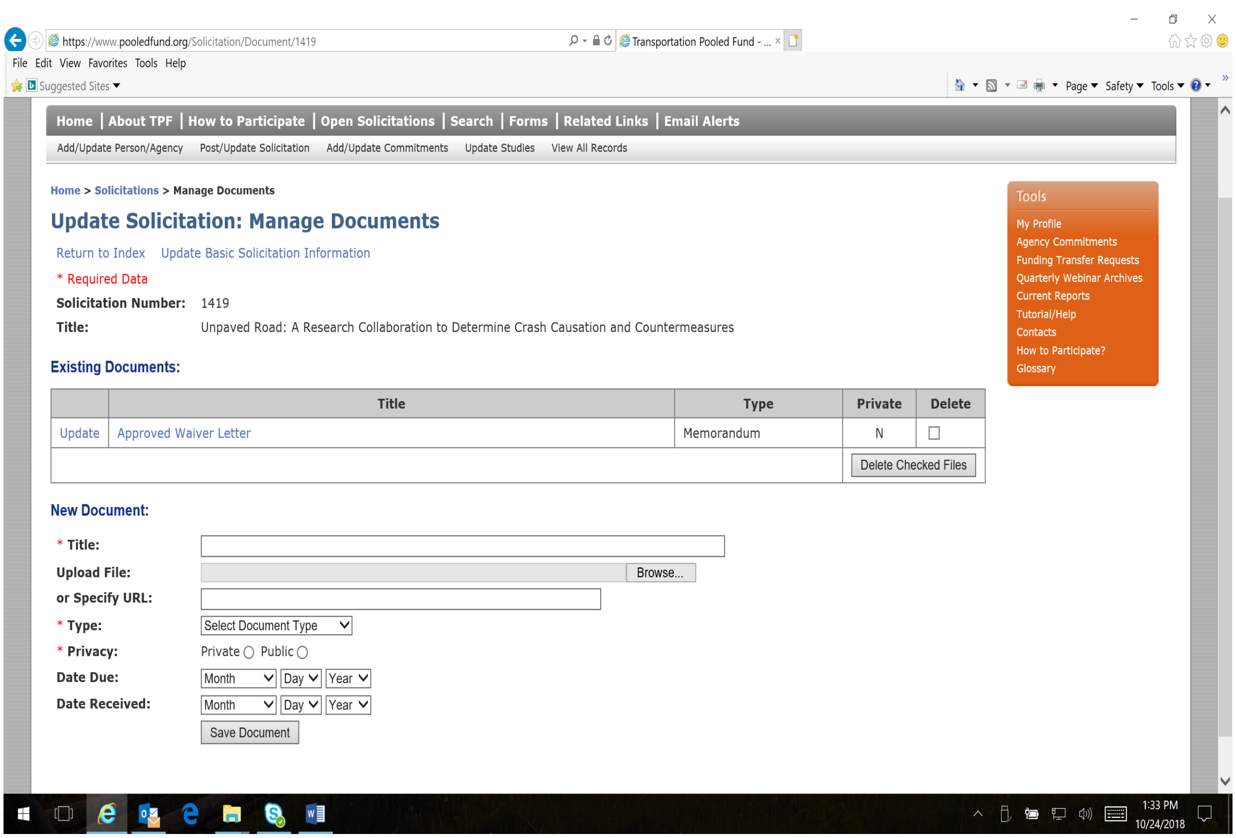
1. Click on Post/Update Solicitation from the second line menu bar
2. Click on Post New Solicitation



3. In the form that comes up:
   a. Your agency will automatically be listed as the Lead Agency and your name will be listed as the Lead Agency Contact. You can change the Lead Agency Contact if necessary.
   b. You can select a Project Facilitator. This person has the same rights as a Lead Agency Contact and can assist with making updates to the Solicitation and later to the Study as needed. A project facilitator can be from any agency and could even be a consultant that you've hired to help with the work. If their name is not already in the drop-down box you will need to add them to the TPF database by clicking on Add/Update Person/Agency in the menu bar at the top and adding a new person. Once they are added they will automatically appear in the Project Facilitator drop down box and the webmaster will automatically receive an email notification to set up a login account for that person.
   c. Fill out all required fields.
   d. Click on Save – Your Solicitation has now been saved and a Solicitation number created.
4. An email will be sent to all TPF web site subscribers and Lead Agency Contacts notifying them that a new solicitation has been posted. These notification emails are typically sent each evening.

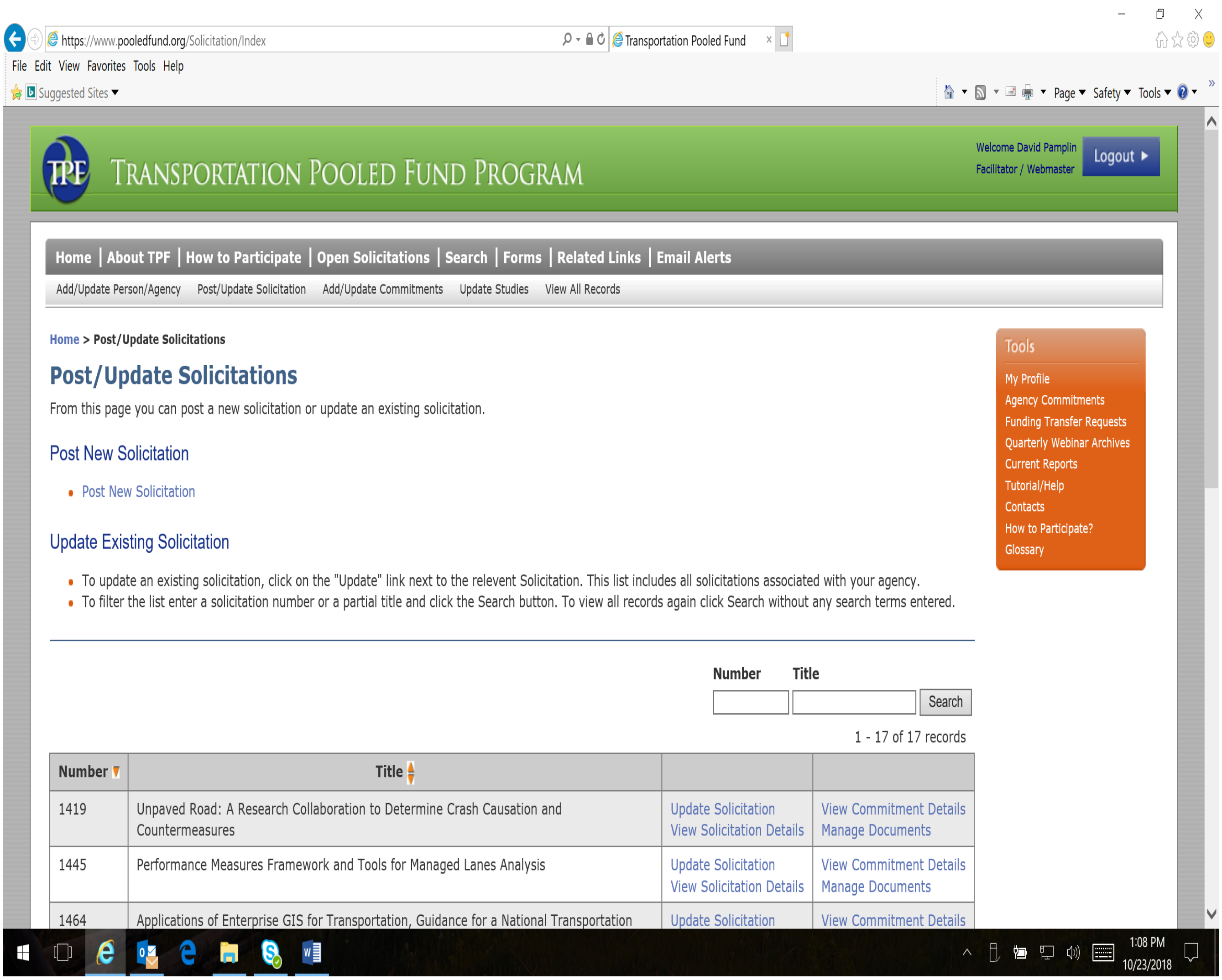


5. If you want to link a web site or document to the solicitation:
    a. Then click on Post/Update Solicitations.
    b. Find your solicitation in the list and click on Manage Documents.
    c. From here you can upload a document or specify a URL to include with the solicitation by completing the lower section of the "Post Solicitation page for your project. (see below)



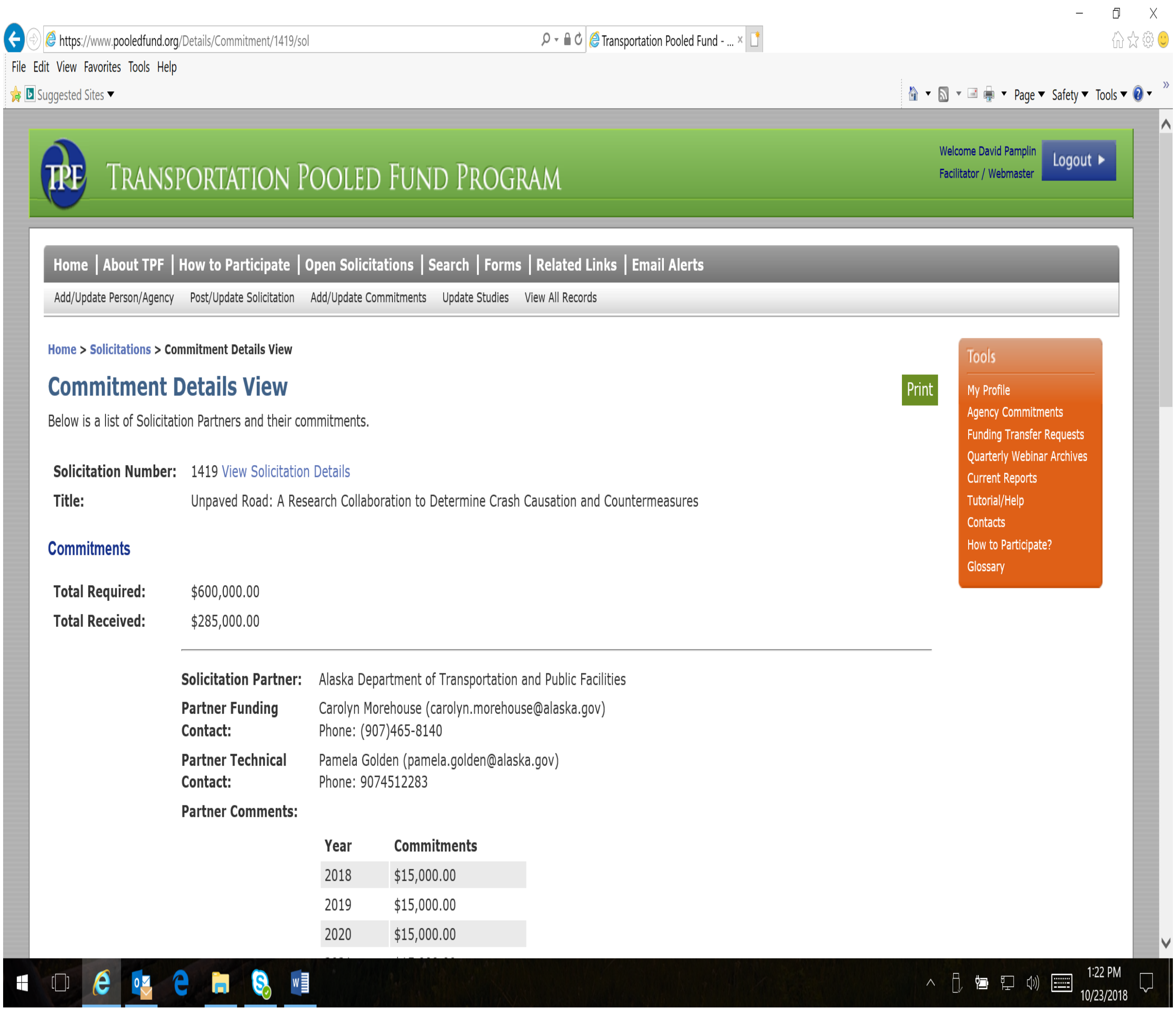
Updating an Existing Solicitation

1. Click on Post/Update Solicitation
2. Scroll down to the list of existing Solicitations and find the Solicitation you want to update or enter the project number into the “Number” box.
3. Click on Update Solicitation to update any of the fields in the Solicitation or Click on Manage Documents to upload a document to the solicitation or post a link to a web site to the solicitation.



Viewing All Commitments for a Solicitation

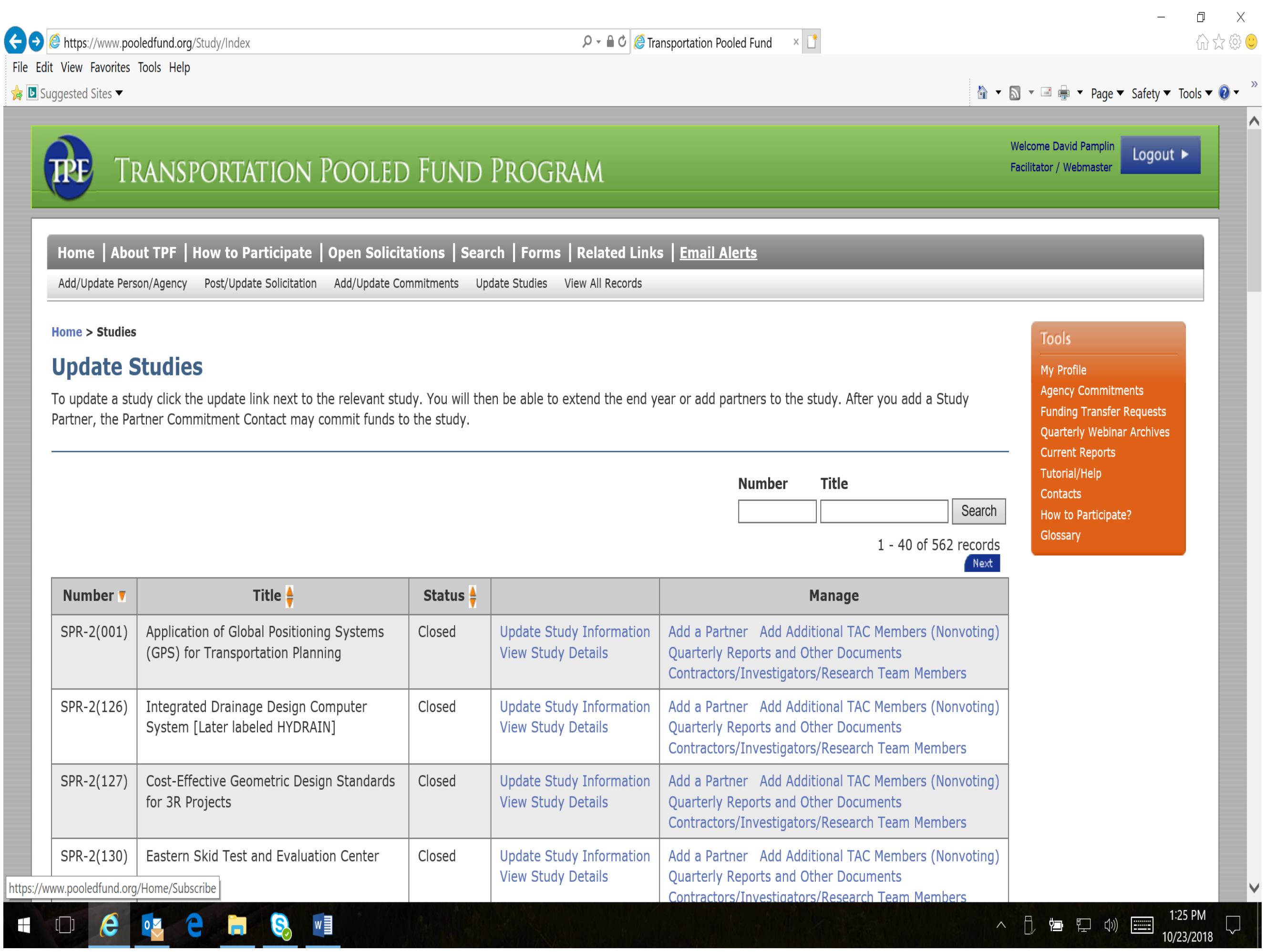
1. Click on Post/Update Solicitation.
2. Scroll down to the list of existing Solicitations and find the Solicitation for which you want to view Commitments.
3. Click on View Commitment Details. On this page, you will see all partners and the amount of their commitment for each year that they've committed.



How to Manage a Study?

Updating a Study

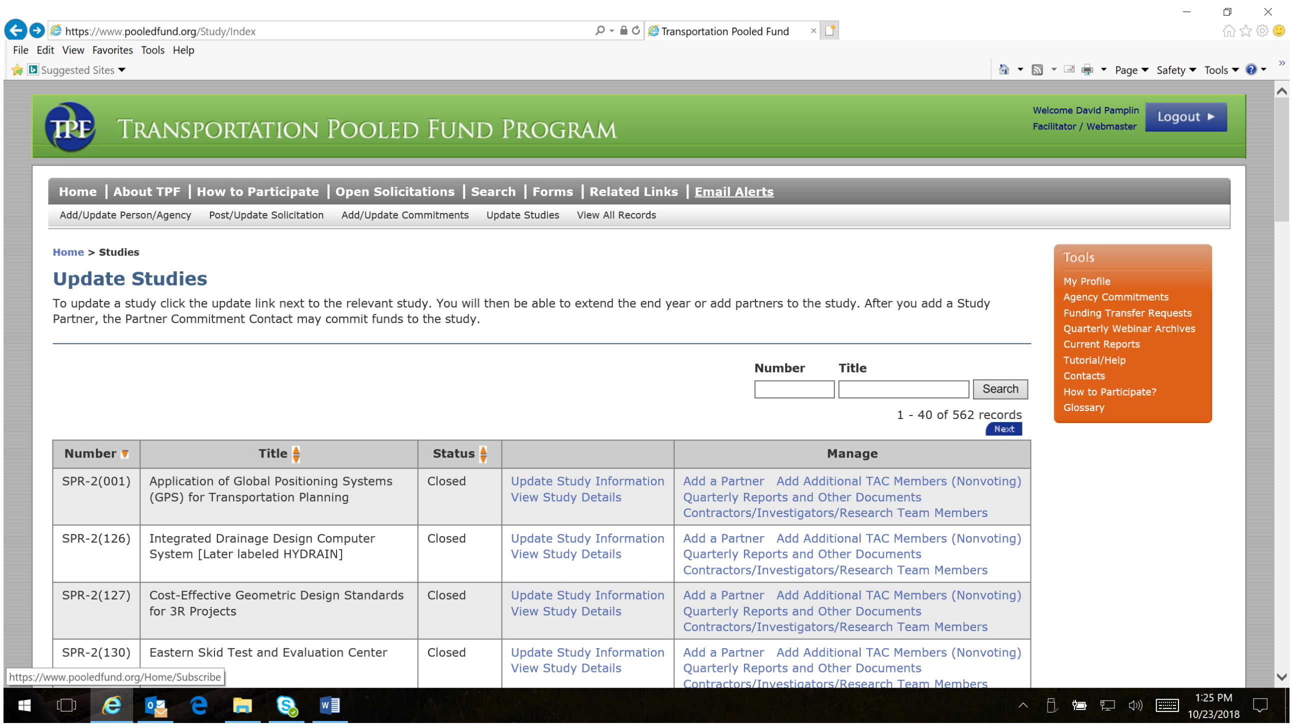
1. Click on “Update Studies” from the second menu line from the top of the Home Page
2. Find the Study you want to Update
3. Click on Update Study Information for your project.



4. From here (from the Manage box) you can update Study details, indicate if Sufficient Commitments have been received, allow additional Commitments from current partners even if sufficient Commitments have been received, and change the Commitment end year.

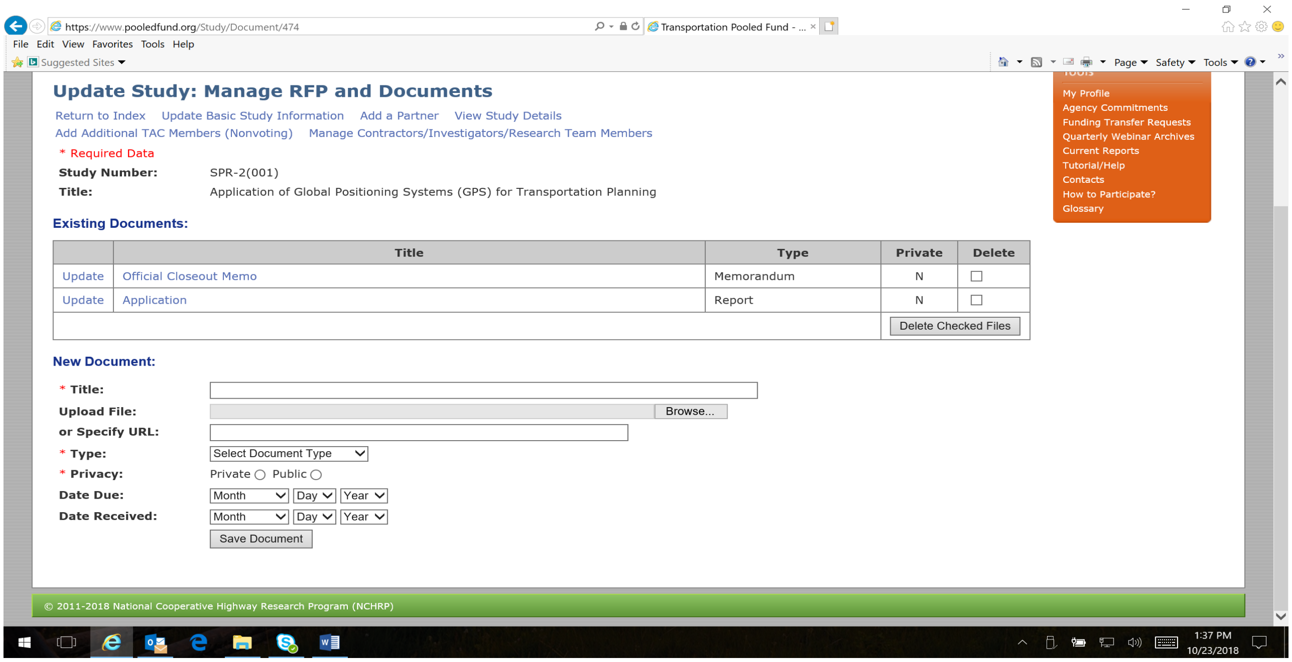
Posting a Document to a Study (such as a Quarterly Report, Closeout Memo, Final Report, etc.) or Updaing an Existing Document

1. Click on Update Studies
2. Find the Study for which you want to post the document.
3. In the Manage column, click on Quarterly Reports and Other Documents



4. To post a new document scroll to the bottom of the page to the New Document heading.
   a. Find the file you want to upload by clicking on the Browse button.
   b. Select if you want the document to be Public or Private. Public documents can be seen by everyone, whether or not they are an authorized user. Private documents can only be seen by people associated with the study (i.e., Partners, TAC, research team members). Documents with funding information should be marked as private.

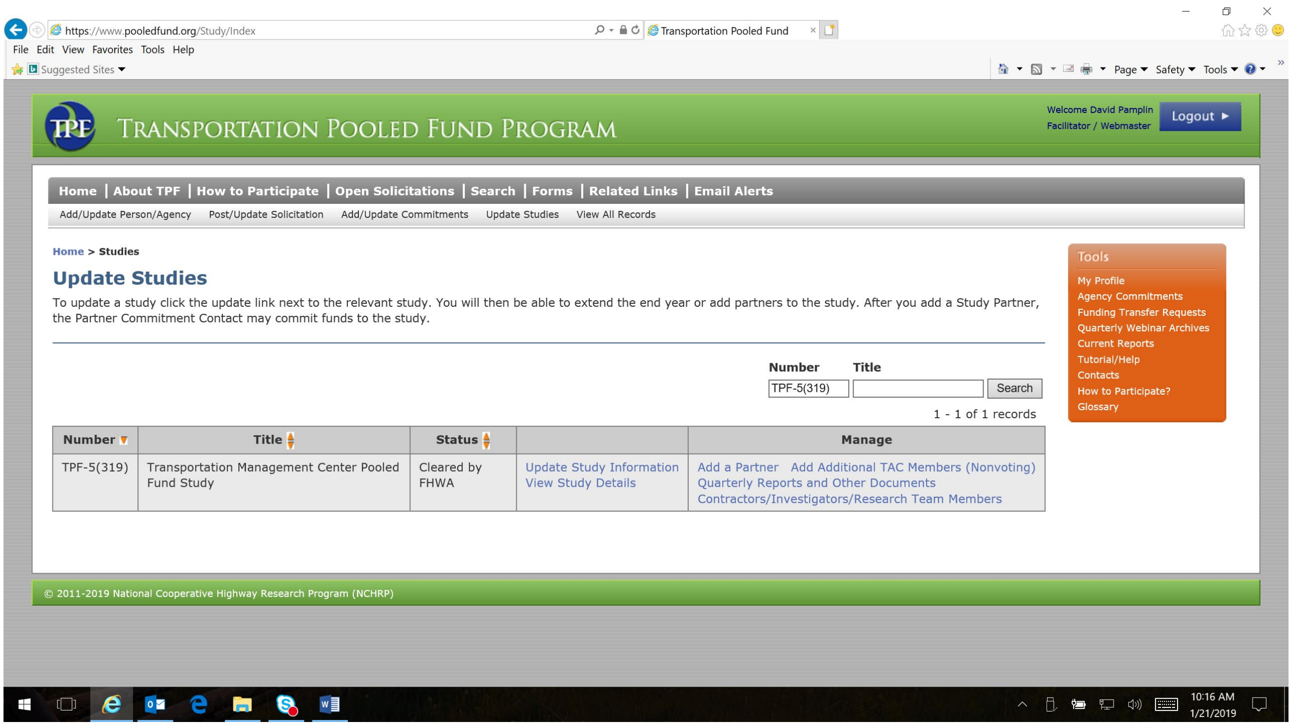
   c. The Date Due and Date Received fields do not need to be completed.
   d. Click on Save Document.
   e. Study Partners and TAC members will receive an email notifying them that the document was posted.



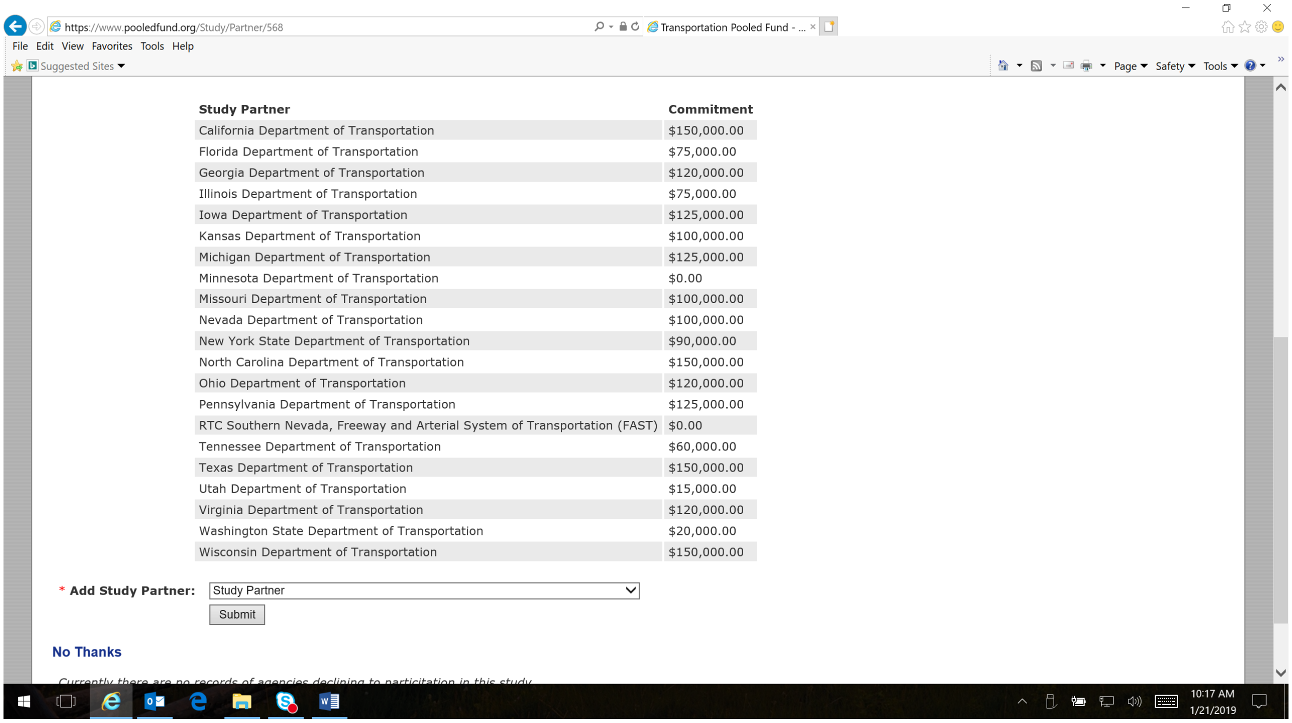
5. To update an existing document:
    a. Find the document you want to update and click on the Update link next to it. On that page, you can update the document details or replace it with a new file.
6. To delete an existing document:
    a. Find the document you want to delete and select the check box next to it.
    b. Click on Delete Checked Files

Adding a Partner to a Study

In order to commit funds to a study that has indicated that sufficient commitments have been received but is still accepting commitments from current partners, an agency must be added as a Partner to the study.



1. Click on Update Studies.
2. Find the Study for which you want to add a Partner.
3. In the Manage column click on Add a Partner.
4. Scroll down to the “Add Study Partner” field and select the Partner Agency from the drop-down box. If the Partner you want to add is not in the box you will need to go to Add/Update Person/Agency in the top menu bar and add the new agency. Once you add the agency they will appear in the drop-down box.
5. Click on Submit.



Study Partner	Commitment
California Department of Transportation	$150,000.00
Florida Department of Transportation	$75,000.00
Georgia Department of Transportation	$120,000.00
Illinois Department of Transportation	$75,000.00
Iowa Department of Transportation	$125,000.00
Kansas Department of Transportation	$100,000.00
Michigan Department of Transportation	$125,000.00
Minnesota Department of Transportation	$0.00
Missouri Department of Transportation	$100,000.00
Nevada Department of Transportation	$100,000.00
New York State Department of Transportation	$90,000.00
North Carolina Department of Transportation	$150,000.00
Ohio Department of Transportation	$120,000.00
Pennsylvania Department of Transportation	$125,000.00
RTC Southern Nevada, Freeway and Arterial System of Transportation (FAST)	$0.00
Tennessee Department of Transportation	$60,000.00
Texas Department of Transportation	$150,000.00
Utah Department of Transportation	$15,000.00
Virginia Department of Transportation	$120,000.00
Washington State Department of Transportation	$20,000.00
Wisconsin Department of Transportation	$150,000.00

* Add Study Partner: Study Partner

Submit

No Thanks

6. The current Study Partners will receive an email notifying them that a new Partner has been added.
7. You will then need to contact the Partner and let them know that they can commit to the study. Partners must enter their Commitments in the web site on their own. Commitments to a study can only be made if the Study is set to still accept commitments and the Commitment End Year is not in the past.

Continue Allowing Commitments to a Study

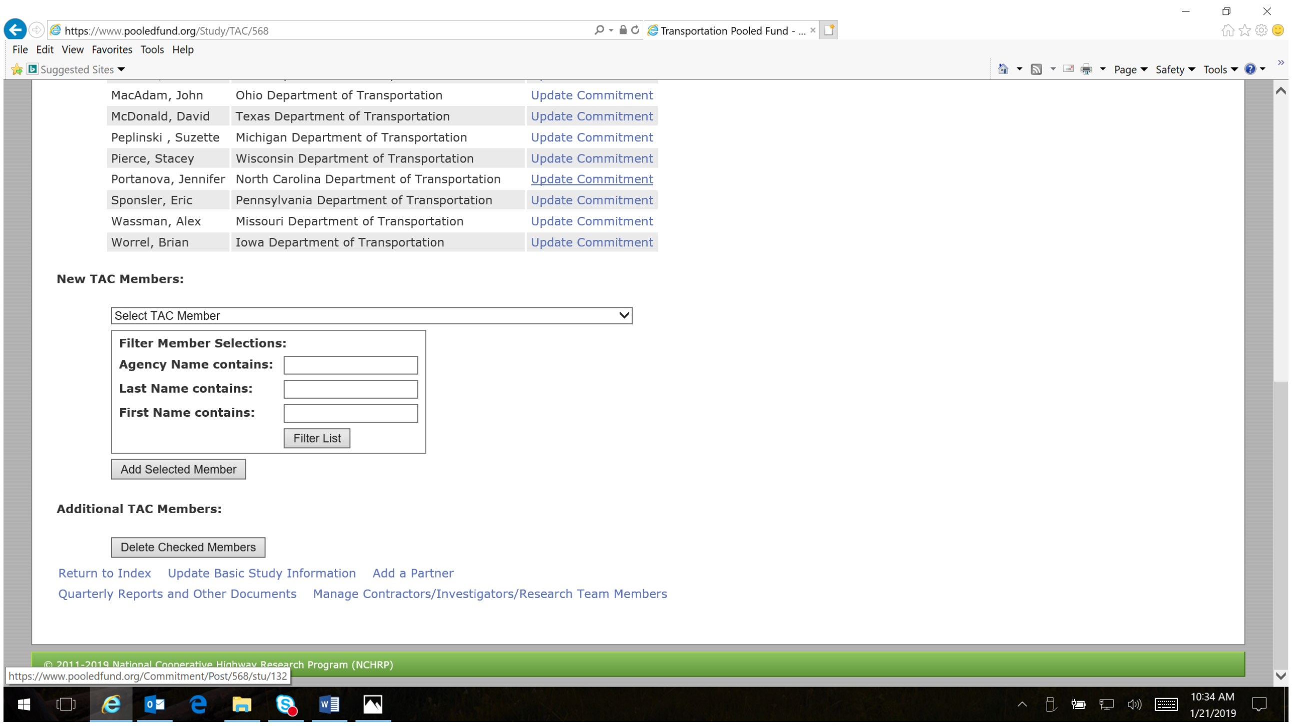
1. If sufficient Commitments have been received but you would like to still allow Current Partners to Commit to the Study:
    a. Click on Update Studies.
    b. Find the Study you want to continue to allow Commitments from Current Partners for.
    c. Click on Update Study Information.
    d. Scroll down to the bottom of the page to the Finance Information section.
    e. Set Allow Additional Funds from Current Partners to “Yes”.
    f. Ensure that the Commitment End Year is either the current year or a year in the future.

Adding a New TAC Member to a Study

Study Partners are automatically listed as Study TAC Members. To add a new TAC Member to a Study from an Agency that is not a Study Partner:

1. Click on Update Studies.
2. Find the Study for which you want to add a TAC member.
3. In the Manage column click on TAC Members.
4. On the page that comes up, the Permanent TAC Members are those people that are also Study

Partners. Scroll down the page to the New TAC Members section.

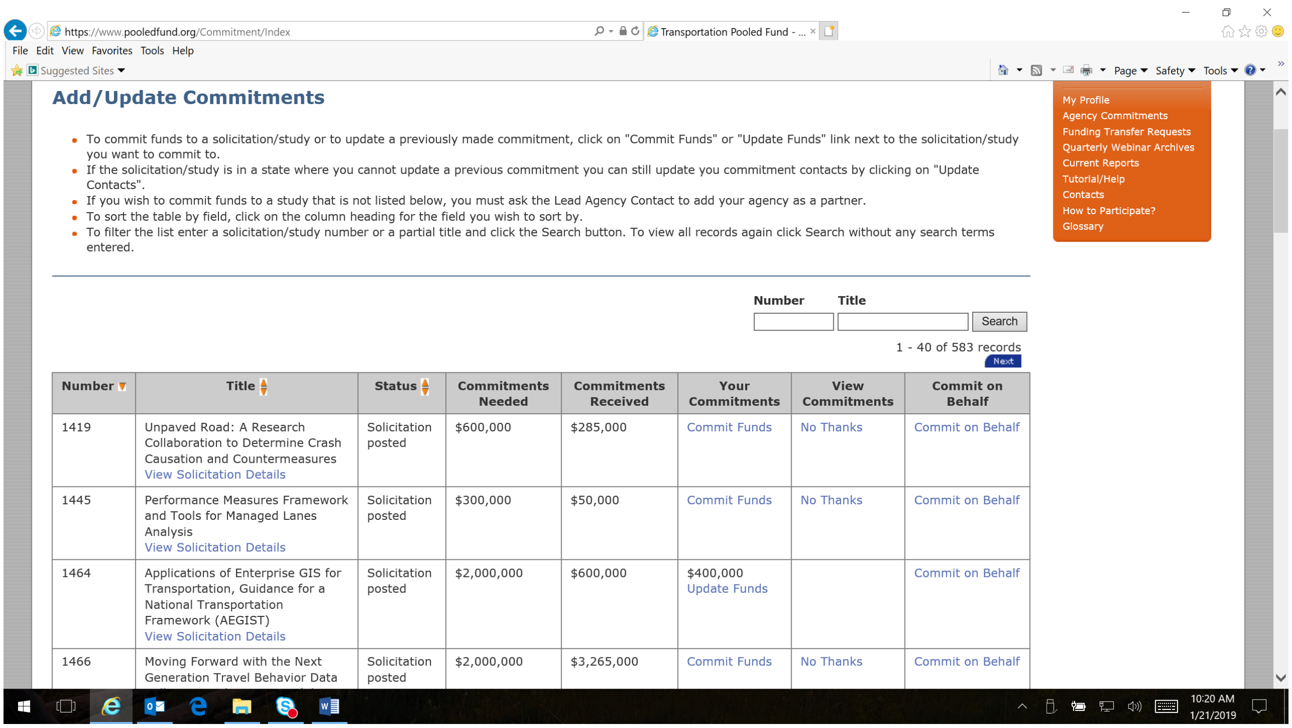


5. Select the TAC Member from the drop-down box.
6. Click Add Selected Member. If their name is not already in the drop-down box you will need to add them to the TPF database by clicking on Add/Update Person/Agency in the menu bar at the top and adding a new person. Once they are added they will automatically appear in the drop-down box.
7. If the new TAC Member does not already have a TPF login account, the webmaster will automatically receive an email notification that a new account needs to be created.

How to Post a Commitment, Update an Existing Commitment, or View Agency's Commitments?

Posting a New Commitment

1. Click Add/Update Commitments
2. The list that appears includes those Solicitations and Studies that are still accepting commitments and those that you have already commitment to. Solicitations and/or Studies that are still accepting Commitments will have a link to Commit Funds in the Your Commitments column.



Add/Update Commitments

- To commit funds to a solicitation/study or to update a previously made commitment, click on "Commit Funds" or "Update Funds" link next to the solicitation/study you want to commit to.
- If the solicitation/study is in a state where you cannot update a previous commitment you can still update you commitment contacts by clicking on "Update Contacts".
- If you wish to commit funds to a study that is not listed below, you must ask the Lead Agency Contact to add your agency as a partner.
- To sort the table by field, click on the column heading for the field you wish to sort by.
- To filter the list enter a solicitation/study number or a partial title and click the Search button. To view all records again click Search without any search terms entered.

Number Title Search

1 - 40 of 583 records Next

Number	Title	Status	Commitments Needed	Commitments Received	Your Commitments	View Commitments	Commit on Behalf
1419	Unpaved Road: A Research Collaboration to Determine Crash Causation and Countermeasures View Solicitation Details	Solicitation posted	$600,000	$285,000	Commit Funds	No Thanks	Commit on Behalf
1445	Performance Measures Framework and Tools for Managed Lanes Analysis View Solicitation Details	Solicitation posted	$300,000	$50,000	Commit Funds	No Thanks	Commit on Behalf
1464	Applications of Enterprise GIS for Transportation, Guidance for a National Transportation Framework (AEGIST) View Solicitation Details	Solicitation posted	$2,000,000	$600,000	$400,000 Update Funds		Commit on Behalf
1466	Moving Forward with the Next Generation Travel Behavior Data	Solicitation posted	$2,000,000	$3,265,000	Commit Funds	No Thanks	Commit on Behalf

3. Click on Commit Funds. If you do not see this link next to the Solicitation or Study you want to commit to it means that the Solicitation or Study is no longer accepting commitments. Please contact the Lead Agency Coordinator for the Solicitation or Study if you feel this is in error.
4. On the Commit Funds page, your agency will be automatically filled in for the Partner Agency and your name will be selected for the Funding Contact. You can change the Funding Contact if you'd like. You also need to select a Technical Contact, which will be the person responsible for interfacing with the study. This could be the same person as the Funding Contact.
5. Indicate your agency's commitments for each fiscal year accepting commitments.
6. Click Save.
7. The Lead Agency Contact will receive an email notification that you have made a commitment to the solicitation or Study. You will now be listed as a Partner of the Solicitation or Study and will receive emails as updates are made.

Updating an Existing Commitment

1. Click Add/Update Commitments
2. The list that appears includes those Solicitations and Studies that are still accepting commitments and those that you have already commitment to. For Solicitations or Studies that your agency has already committed to you will see one of two links in the Your Commitments column:
    a. Update – Click on this link to update your agency's Commitment amounts or update the Funding and/or Technical Contact for your agency.
    b. Update Contacts – This indicates the Solicitation or Study is no longer accepting updates to existing commitments or new commitments. You can still update the Funding Contact and/or Technical Contact from your agency.

Viewing Agency's Commitments

1. To View your agency's Commitments for a particular Solicitation or Study:
    a. In the orange Tools box click on Agency Commitments
    b. This page will present a list of all Solicitations and Studies for which your agency has commitments and the commitment amount per year for each Solicitation and/or Study.

How to Update the Funding and/or Technical Contact for your Agency for a Particular Solicitation or Study?

1. Click Add/Update Commitments (from the main menu)
2. For Solicitations or Studies that your agency has already committed to you will see one of two links in the Your Commitments column, depending on whether or not the solicitation/study is still accepting commitments – Update or Update Contacts. Click on either link.
3. Select the correct person from the drop-down boxes for Funding Contact and Technical Contact. If the person is not already in the drop-down box you will need to add them to the TPF database by clicking on Add/Update Person/Agency in the menu bar at the top and adding a new person. Once they are added they will automatically appear in the drop-down box. The TPF webmaster will automatically receive an email notification that a new authorized user account is needed for this person.
4. Click on Save at the bottom of the screen.

If you would like to view all Solicitations and Studies associated with your agency, click on View All Records.

If you would like to update your personal information (email, name, password), click on My Profile in the orange Tools box.

If you would like to view the latest TPF program reports (i.e., Fiscal Year Funding Transfer Requests, you can find them under What's New on the homepage or under the Current Reports link in the orange Tools box.

For any questions please contact the Pooled Fund Program Manager at (202) 493-3166