ProTrack+ 101
An Introduction to DDOT’s Project Management Application
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Introduction

This tutorial provides an introduction to DDOT’s ProTrack+ project management application. This guidebook will cover several basic functions within the ProTrack+, including:

- Creating projects and adding locations to project records.
- Navigating projects through the solicitation and task order phases.
- Using Packet Tracker to guide various requests through their approval processes.
- Managing project locations in using the Contract Administration module.

For further information about ProTrack+, including more information about the features introduced in this tutorial, please visit the ProTrack+ page on DDOT’s wiki site, which features informational videos and guidebooks about the application.

To sign up and create a username for the ProTrack+ application, or for further questions about ProTrack+, please contact ptpsupport@dc.gov.

If you are viewing the digital version of this document, this is an interactive PDF. There are embedded hyperlinks throughout the document. The Table of Contents and any reference to a page number is clickable and will take you to that page. Additionally, the “d.delivers” image in the bottom right corner of every page in this document will take you back to this Table of Contents page if clicked.
Creating Projects and Adding Locations to Project Records

During the planning process for a DDOT project, ProTrack+ users can create a project record and plot their project’s location(s) through the application’s interactive map.

**Creating a Project**
Users can create a project record and plot project location(s) at any time before the solicitation process. When naming a project, users should follow the project name conventions in the “Naming Guidance” and “Name Suggestor” documents that are included on the “New Project / Parent Record” page.

**Adding Locations to Project Records**
Once users create a new project record, they can plot the location(s) of their project using the ProTrack+ interactive map. The ProTrack+ map feature allows users to define project locations by plotting points, lines and polygons; these shapes can be used to define small to large location areas, respectively. This “ProTrack+ 101” guidebook covers several of these location plotting methods, but for more information, please see the guidebooks and videos available on the ProTrack+ wiki page.
Creating a Project in ProTrack+

**STEP #1**

- Go to Home Page
- Select Project Management tab
- Click on “New Project / Parent Record”

**STEP #2**

- Fill out all applicable fields in Project Details form
- Click the “Submit” button

*Note: When naming your projects, please follow the suggested naming conventions in the “Naming Guidance” and “Name Suggestor” documents.*
Locating a Project in ProTrack+

**STEP #1**

- Go to Home Page
- Select Project Management tab
- Click on “List of Project / Parent Records”

**STEP #2**

Search for your project!
- Click on the triple dot icon near each category to change sorting order
- Or scroll through options in the drop down menus
Locating a Project in ProTrack+

**STEP #3**

- Click on the “Add/Edit Location(s)” icon to add or edit your project’s location(s)
The new ProTrack+ GIS map, which is used to plot and manage project locations in the Project Management and Contract Administration modules, features a condensed tool bar. Many of the tools from the previous ProTrack+ map that had icons featured on the right side of the map are now “nested” within other, more general icons.
Along with new tools, the new map features houses many of the old tools that were featured as icons on the past map in parent tool icons. Below is an overview of the new toolbar layout and the contents within these parent tool icons:

- **Location Search Tool** - Search for a location by entering an address, route, intersection or place.
- **Show Layer List Tool** - Allows users to expose informational layers (work orders, TOPS layers, etc.)
- **Location Plotting & Editing Tools** - A parent tool that houses tools to plot project location(s) (point, line, polygon, segment, etc.) as well as a tool to edit existing locations.
- **Upload Location(s) File Tool** - Allows users to upload project location data from CSV files.
- **Download Data Tool** - Export the data that you’ve entered in the GIS map tool via CSV or JSON files.
- **Miscellaneous Tools** - Houses Settings, Print, Measure, Coordinate Converter, Save Sessions and Screen Capture tools.
- **Add Additional Layers Tool** - Allows users to add additional layers to the Show Layer List tool.
- **Filter DDOT Projects Tool** - Allows users to filter DDOT projects using various formulas.
Location Plotting and Editing Tools - Points, Lines and Shapes

**Note:** To open the ProTrack+ interactive map and find your project’s location please see the “Locating a Project in ProTrack+” section (page 4).

**Sketching Tools**

The tools to plot project locations are all housed in a parent tool that is called “Toggle Editor Tools,” which is the third icon from the top on the toolbar on the right of the map. Click on this icon to reveal a pop-up window with tools to mark your project’s location(s).

The pop-up has three tabs, the first of which is the “Sketching Tools” tab (see red box on top left of the image above). This tab contains the following five tools, which are outlined in the rectangular red box.

1. **Draw a Point** - A tool for entering point projects, which is useful for small, granular projects such as traffic signals, parking meters, traffic lights, etc. Click on a location with the mouse to select a project area.
2. **Draw a Polyline** - A tool for entering manual line projects. You can shift the axis of the line by clicking once on the mouse and finalize the line by clicking twice on the mouse.
3. **Draw a Polygon** - A tool for drawing large project areas. Click once on the mouse to shift the axis of the shape; click twice on the mouse to finalize the project area.
4. **Draw a Rectangle** - Draw large project areas in rectangular form by clicking on the icon and then clicking on a location on the map. Hold down the mouse button while you contract or expand the perimeters, and release it once you arrive on the final shape.
5. **Draw a Circle** - Draw large project areas in circular form by clicking on the icon and then clicking on a location on the map. Hold down the mouse button while you contract or expand the perimeters, and release it once you arrive on the final shape.
After clicking on the “Toggle Editor Tools” icon on the right side of the map, select the second tab on the pop-up window entitled “Segment Selection Tools” to choose tools that select roadway and alley segments

1. **Select Route Segments as a Line Project** - A tool for selecting segments from a continuous street. Click down on the mouse and hover over a street segment and release the mouse to highlight the one you’ve chosen. You can select other segments on a continuous roadway in the same fashion. **Please note:** You cannot select roadway segments from different roadways and save them as one project using this tool. If you’d like to select multiple roadways at the same time, please use the “Draw a Polyline” tool (see Page 4).

2. **Select Alley Segments as a Line Project** - A tool for selecting alley segments. Click down on the mouse and hover over an alley segment and release the mouse to highlight the segment you’ve chosen. You can select multiple alley segments in the same fashion.
After clicking on the “Toggle Editor Tools” icon on the right side of the map, select the third tab on the pop-up window entitled “Attribute Editor.” You can now click on project locations and edit the information that appears in the pop-up window, such as “Work Type,” “Budget Year,” and “Estimated Start Date.”

Please note: You can perform the same function by clicking on a project location and then selecting “Edit Attributes” on the bottom of the pop-up that appears:
The “Show Data Upload” tool allows you to upload project locations via CSV files. Users can use this tool to upload several different project locations at once.

**Please note:** CSV files have to be properly formatted before they can be uploaded to ProTrack+, and should follow DDOT’s Roads & Highways LRS model. For more information, please click on the “Information” tab once you click on the “Show Data Upload” icon.

**Show Data Upload Tool - Step #1**

- Click on the “Show Data Upload” icon
- Select what kind of features you would like to upload by clicking the drop-down arrow in the “Upload Features” section (you can upload line projects or two types of point projects)
- Click the “Upload File” button
After you have uploaded a correctly-formatted CSV file, you will see all the locations in the file displayed in a table.

Scroll down the pop-up and click on the “Upload...” button to load the features to the map.
Voila! Your locations appear on the map!

• To edit the information for each location you upload from a CSV file, click on the point / line and then select “Edit attributes”
Preface

After a project finishes the solicitation process and a contract has been awarded, users can oversee the project and manage it through its life cycle in the Contract Administration module.

Users can fill out the following fields for each location in a project record as they track the state of a project:

- Status (Under Construction, Under Design, Substantially Complete, etc.)
- Percentage Complete
- Estimated and actual start and completion dates
- Estimated and actual cost

To reach the Contract Administration module, please go to Contract Administration -> Manage Project Status.

Opening the New Contract Administration Map

After navigating to the Contract Administration Module (Contract Administration Tab->Manage Project Status) search for your project and click on the dark blue “Add/Edit Location(s)” icon beside the project you’d like to manage:

Add/Edit Location(s) icon
To add shovel-ready project locations from the Project Initiation map to the Contract Administration map, please follow the steps below.

**ADDING LOCATIONS TO CONTRACT ADMINISTRATION MAP - STEP #1**

- Click on the “Show Project Initiation Features” icon
Contract Administration Module - Import Project Locations

**ADDING LOCATIONS TO CONTRACT ADMINISTRATION MAP - STEP #2**

- Click on any purple project location that appears in the pop-up map

**ADDING LOCATIONS TO CONTRACT ADMINISTRATION MAP - STEP #3**

- Click “Add to Award Contract”
- Any location that you select and then click “Add to Award Contract” for will appear on the main Contract Administration map, in red
**Please note:** To add shovel-ready project locations from the **Project Initiation map** to the **Contract Administration map**, please follow the steps on **Page 15**.

**MANAGE LOCATIONS IN CONTRACT ADMINISTRATION MODULE - STEP #1**

<table>
<thead>
<tr>
<th>Project Line</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Project ID:</strong></td>
</tr>
<tr>
<td><strong>Project Name:</strong></td>
</tr>
<tr>
<td><strong>Budget Year:</strong></td>
</tr>
<tr>
<td><strong>Project Identifier:</strong></td>
</tr>
<tr>
<td><strong>Work Type:</strong></td>
</tr>
<tr>
<td><strong>Status:</strong></td>
</tr>
<tr>
<td><strong>Request Type:</strong></td>
</tr>
<tr>
<td><strong>Solicitation No:</strong></td>
</tr>
<tr>
<td><strong>Contract No:</strong></td>
</tr>
<tr>
<td><strong>Task Order Request No:</strong></td>
</tr>
<tr>
<td><strong>Task Order No:</strong></td>
</tr>
<tr>
<td><strong>Est. Start Date:</strong></td>
</tr>
</tbody>
</table>

- Click on the any project location that you’d like to manage the status of
- A pop-up will appear (pictured above)
- Select “Edit attributes” to manage the project location’s status and information
Update the information in the “Edit attributes” pop-up
Click “Update Attributes” when finished
To close the pop-up, click on the “Toggle Attribute Editor” icon in the toolbar on the right side of the page
The Contract Administration map has many other features that you can use to help manage your project:

- Add work orders and service requests to the scope of your project (this page)
- Relate select permits to your project (Page 22) and view conflicts (Page 23)
- Generate mailing addresses for affected residents and business owners (Page 24)

**LINK WORK ORDERS AND SERVICE REQUESTS - STEP #1**

<table>
<thead>
<tr>
<th>Project Line</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project ID:</td>
</tr>
<tr>
<td>Project Name:</td>
</tr>
<tr>
<td>Location Name</td>
</tr>
<tr>
<td>Budget Year:</td>
</tr>
<tr>
<td>Project Identifier:</td>
</tr>
<tr>
<td>Work Type:</td>
</tr>
<tr>
<td>Status:</td>
</tr>
<tr>
<td>Request Type:</td>
</tr>
<tr>
<td>Solicitation No:</td>
</tr>
<tr>
<td>Contract No:</td>
</tr>
<tr>
<td>Task Order Request No:</td>
</tr>
<tr>
<td>Task Order No:</td>
</tr>
</tbody>
</table>

- Click any project location to activate a pop-up
- Select the “...” icon in the pop-up
- Click on “Add / View open issues”
**Contract Administration Module - Link Work Orders, Service Requests**

**LINK WORK ORDERS AND SERVICE REQUESTS - STEP #2**

- Select the service requests or work orders you would like to add to the scope of your project
- Click on “Add Selected to Scope”

**Please Note:** If you add work orders and service requests to the scope of your project it will result in the following:

- Selected open issues will be added in ProTrack+
- Status of selected work orders will be scheduled in Cityworks and a work order task will be created with the ProTrack+ project status
- When your project status changes in ProTrack+, new work order tasks will be created, and the previous task order will be marked as complete
- Selected service requests will be marked pending in Cityworks
To remove the service requests and/or work orders that have been associated with a project location (see Page 19), click on the “...” icon in the pop-up that appears after you click on a location
- Click on “Remove open issues”
- Select the service requests and/or work orders you would like to disassociate with the project
- Click on “Remove Selected From Scope”
Contract Administration Module - Relate Select Permits to Project

**Relate ‘ENP for DDOT Contractors’ Permits to Project Location**

- Click on the location to activate the pop-up
- Select the “...” icon in the pop-up that appears after you click on a location
- Click on “Relate to permits”
- A pop-up will appear featuring ‘ENP [Emergency No Parking] for DDOT Contractors’ permits within the selected project’s area
- Select the permits that you would like to relate to the project
- Click the “Relate to Project” button to relate the selected permits

**Please Note:** Relating ‘ENP for DDOT Contractors’ permits to projects is helpful for project managers to see potential conflicts. For example, users can utilize this feature to see if permitted permits conflict with one another and perhaps synchronize two permitted projects.
Click on the location to activate the pop-up
Click on “View conflicts”
Scroll down on the new pop-up that appears (at top left) to see the various potential conflicts with DDOT projects, utility work, construction projects, etc.
• Click on a project location to activate the pop-up
• Select the “...” icon in the pop-up that appears after you click on a location
• Click on “Generate nearby mailing list”

• ProTrack+ will automatically generate an Excel spreadsheet of the addresses of nearby stakeholders within 100 meters of the project, which users can utilize for various project-related public outreach efforts
Once you start managing the location(s) in your project in the Contract Administration module, you have the ability to export the information in the Contract Administration map to the District Transportation Access Portal (DTAP) so that public can view the project as it progresses through its life cycle.

Once you “push” your project to DTAP, the changes that you make to the project’s status in the Contract Administration map (for example, changing a location from 25 percent to 50 percent complete) will be reflected on DTAP, so that the public can view the status of the project in real time.

**STEP #1**

- Find your project on the Manage Project Status page
- Click on the “Publish” icon
ProTrack+ is foremost known as a project management application. It is, however, much more than that as well. Included in ProTrack+, specifically in the application’s GIS map feature, are powerful research tools that can be used to quickly investigate a great number of issues: from work orders and construction permits near a given address to what an intersection looked like on the ground – and from above – four to five years ago.

In this section, we highlight a few of the many tools that are featured on the ProTrack+ GIS map. This is a brief introduction into how to research issues using ProTrack+; it is by no means an exhaustive look into all the tools that are featured on the ProTrack+ GIS map. For more questions about these tools, please contact the ProTrack+ team at ptpsupport@dc.gov.

To access the ProTrack+ General Map Viewer tool, please follow the steps below:

**Opening the General Map Viewer**

- Go to the ProTrack+ Home Page
- Select “Map Viewer” tab
- Click on “General Map Viewer”
Examples of Information in the Layers Feature

- DDOT work order and service requests (Cityworks)
- Construction and occupancy permits (TOPS)
- Transit infrastructure (Capital Bikeshare stations, bus stops, traffic signals, etc.)
- Parking information (loading zones, tour bus parking, etc.)
- Official boundaries (ANCs, MPD districts, wards, zip codes, etc.)

The previous ProTrack+ map had only one layer-related icon, “Toggle Layers,” which exposed dozens of layers, some of which users might not need.

The new ProTrack+ map has **two layer-related icons**: “Show Layer List” and “Show Add Layers.” The “Show Layer List” icon (second from top on toolbar) shows you five types of often used layers. The “Show Add Layers” icon allows you to add different types of layers to the “Show Layer List” pop-up; allowing users to customize this pop-up so it is not so crowded with layers that they might not need.
The “Show Layer List” tool displays a pre-selected set of layer types, which are utilized by most users. This list can be customized by using the “Show Add Layers” tool (see Page 10). The five pre-selected layer types that appear when you click on the “Show Layer List” icon are:

- **Project Initiations** - Displays DDOT projects that have been plotted in ProTrack+. You have the option to see DDOT point, line and polygon projects.
- **Project Initiations (Other)** - Shows DDOT projects that have been plotted in ProTrack+ **without** the point, line or polygon tool.
- **Reference Network Layers** - Allows you to display roadway by different categories (blocks, block intersections, DC Route, etc.).
- **Administrative Boundaries** - See various administrative boundaries in the District, such as Wards, Advisory Neighborhood Commission (ANC) districts, police districts, etc.
- **Imageries** - Shows various GIS overlays on the map, such as Right of Way (ROW) imagery or aerial photography (DC Ortho Image).
**Map Viewer Research Tools - Layer Tools**

**SHOW LAYER LIST TOOL - EXPOSE SUB-LAYERS**

To show the sub-layers within the layer types menu:

1. Click on the “Show Layer List” icon
2. Click on one of the right-facing arrows on the left of the Show Layer List pop-up.
3. Click the “eye” icons to the left of whatever sub-layer you would like see

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**Step #2 - Click on Right-Facing Arrow**

**Step #3 - Click on Eye Icon**

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**RESULT - MAP AFTER SELECTING ‘NEIGHBORHOOD CLUSTER’ SUB-LAYER**
To add additional layer types to the “Show Layer List” pop-up, first click on the “Show Add Layers” icon, which is the second to last icon on the toolbar.

**Show Add Layers Tool - Adding Layer Types to Show Layer List pop-up**

- Click on the “Show Add Layers” icon
- Select any of the layer types you would like to add to the “Show Layer List” menu
- Click the “Add Selected” button
After you have successfully loaded layer types from the “Show Add Layers” tool, layers will be displayed in the “Show Layer List” tool. To expand the layer types, click on the right-facing arrow; to activate the layer types in the drop-down list that appears click on the “eye” icon.

If you would like to delete the layer types you’ve added to the “Show Layer List” menu, simply click on the trash can icon.

**RESULT - ADDITIONAL LAYER TYPES ADDED TO SHOW LAYER LIST POP-UP**

![Layer List Pop-Up](image)

**Please note:** Deleting layer types in the “Show Layer List” menu will not permanently remove them from the map. To reload deleted layer types, return to the “Show Add Layers” menu and repeat the steps on Page 10.
Map Viewer Tools - Miscellaneous Tools

The “Miscellaneous Tools” icon contains an assortment of research tools as well as tools that you can use to set the display settings in the map and save, print and export your work. Below is a color-coded overview of where these tools are contained within the Miscellaneous Tools pop-up, which appears after you click on the icon, which is highlighted with a red arrow below:

**MISCELLANEOUS TOOLS - CONTENT LAYOUT**

- **View Settings** - Change the location of the pop-up windows that appear when clicking on a point, line or polygon project. To dock the pop-up, click on the “Dock” icon (to the left of the “X”).
- **Print / Export** - Allows users to export the content they’ve created via PDF, JPG or other file types.
- **Measurement Tools** - Tools to measure distance or area.
- **Coordinate Converter** - Find coordinates and convert them into various formats (XY, Basemap, etc.).
- **Save Sessions** - Allows users to save their sessions for later or to load new ones.
- **Miscellaneous Tools** - Houses Street Smart Viewer (street level imagery), Pictometry Viewer (aerial
Using Street Smart Viewer

**Note:** To open the ProTrack+ General Map Viewer, please see the directions on Page 26.

Ways to Utilize Street Smart Viewer

- Street Smart Viewer features street view imagery, which is more robust than Google Street View, and goes in alleys in the District
- Time Travel feature, which allows you to view the location several years in the future

**STEP #1**

- Select the “Miscellaneous tools” icon
Using Street Smart Viewer

**STEP #2**

- Click on the “Street smart viewer” icon in the pop-up
- Click on a point on the map where you would like to see street view imagery. The focal point (purple circle) will change when you click on a different point in the map or scroll around the map. (The date on the top of the image is the date that the location was filmed.)
- Scroll around the scene by clicking on the large green dots
• Click on the date on the image to activate the Time Travel feature, which allows you see what locations looked like at several points in time over the past several years.

• Select one of the several points that appear to view what the same location looked like at a point in history. A previous date will appear (for example, May 23, 2015); click on the date.
ProTrack+ users can use the application’s “Filter Tool” to highlight DDOT projects on the ProTrack+ Map Viewer by using different query formulas.

For more information on using query formulas that are not covered in this tutorial, please visit the following webpages, which include examples of various simple and complex formulas:

- SQL Comparison Operators
- SQL Logical Operators
- SQL Wildcard Operators

**Filter Tool - Getting Started**

- Click on the “Filter Tool” icon
- Click “+Add a Filter Expression”
Filter Tool

FILTER TOOL - SIMPLE QUERY

- Identify your desired category of project from the “Layer” drop-down menu (select from point, line or polygon projects)
- Enter a query in the bottom of the pop-up. **Please note:** *New users are encouraged to select “Unique” when performing queries so that they only get responses that are available on the map.*
- Click “Apply Filter” to perform the query
Filter Tool

Filter Tool - Compound Query

- Perform all the steps in the “Simple Query” slide on Page 37
- Click “+Add a Filter Expression” to enter another query, which enables you to form a compound query that synthesizes both queries
- Click “Apply Filter(s)” to finalize the compound query
To add a separate filter query, click on the “+New Filter” button

Enter a new simple query (Page 37) or compound query (Page 38)

Click “Apply Filter(s)"

The new simple / compound query (Filter Query #2) will appear on left side of the pop-up alongside your previous queries (Filter Query #1).
The ProTrack+ Packet Tracker module is used by DDOT staff to usher agreements, contracts and other documents through their various approval processes. These documents are not necessarily related to funding or procurement issues — in some cases they are memorandum of understandings (MOUs), project close-out requests and other documents that involve other, non-monetary matters.

To access the ProTrack+ Packet Tracker module and open a new request, please follow the steps below:

**Creating a New Request in Packet Tracker - Step #1**

- Go to the ProTrack+ Home Page
- Select “Packet Tracker” tab
- Click on “New Request”
• Users are required to fill out all the fields marked with a "*"
• Please fill out all the remaining fields, if possible. *Note: For questions about the relevant FAP Number and DC Project Number, please contact the Office of the Chief Financial Officer.
• After you are finished completing the form, click “Save & Continue”

• Attach the relevant document (for example, a Change Order in this case and any supporting information) by clicking the “+ Add New Document” button
• *Note: You can view the first reviewer and the workflow process by looking at the “Submitted To” and “Approval Process” fields, respectively
Creating a New Request in Packet Tracker - Step #3

- Fill out all applicable fields
- Click “Upload” (Note: Your document will not load and you will not be able to submit your Packet Tracker request if you do not click “Upload”)
- Click “Submit” to finalize your request and send it on to the first reviewer in the Packet Tracker process.
Each document that is uploaded to Packet Tracker goes through a multi-step approval process. Please follow the instructions below to find and review a Packet Tracker request.

**REVIEWING A PACKET TRACKER REQUEST - STEP #1**

- Go to the ProTrack+ Home Page
- Select “Packet Tracker” tab
- Click on “Inbox - Assigned to You / Group”
Using the Packet Tracker Module - Review a Request

**REVIEWING A PACKET TRACKER REQUEST - STEP #2**

- Find the request in the “Inbox - Assigned to You” or the “Inbox - Assigned to Group” sections.
- Click on the “Review” icon on the same line as the request.

**REVIEWING A PACKET TRACKER REQUEST - STEP #3**

- Click on the “Select” button in the “Request Workflow Details” section.
Using the Packet Tracker Module - Review a Request

**REVIEWING A PACKET TRACKER REQUEST - STEP #4**

- Find the request in the “Inbox - Assigned to You” or the “Inbox - Assigned to Group” sections.
- Click on the “Review” icon on the same line as the request.

**REVIEWING A PACKET TRACKER REQUEST - STEP #5**

- Click on the “Select” button in the “Request Workflow Details” section.
• Select “Approve,” “Decline,” “Hold” or “Revise and Re-submit” depending on what action you would like to take
• Enter your comments as necessary
• Click on the “Update” button

• After you click “Update” in the step above it will take you back to this page, where you will see the next reviewer on the list below you
• If you’d like to edit the comments that you made, select the “Edit Comment” button
This tutorial walks users through the solicitation and task order processes in ProTrack+. These processes, which are necessary to procure funding for DDOT projects, involve several divisions within DDOT as well as officials from the Office of Contracting and Procurement (OCP) and the Office of the Chief Financial Officer (OCFO).

Please see the flow chart above for a visualization of the approval processes. **Note that budget officers and budget analysts work for OCFO and contract officers and contract specialists work for OCP. Please also note that creating and reviewing task orders follows most of the same steps as the solicitation process.**
Create a New Solicitation / Task Order Request

**STEP #1**

- Go to the ProTrack+ Home Page
- Select “Procurement” tab
- Click on “Inbox - Assigned to You/Group” alongside either the Solicitation Request or Task Order Request sub menu

**STEP #2**

- Click on the “Create Solicitation Request” or “Create Task Order” button
Create a New Solicitation / Task Order Request

**STEP #3**

- Fill out all the fields that are marked with a “*”. If you select ‘Capital’ as the Budget Type it will prompt you to fill out the Funding Type and DC Project Number fields, which do not appear if you select ‘Operating’ for Budget Type. **Note: If you need the DC Project Number please refer to the PROMPT system or ask an Office of Contracting and Procurement (OCP) staff member.**
- Click on the “Continue” button

**STEP #4**

- Fill out all the fields that are marked with a “*”
- Click on the “Save & Continue” button

**Note: For special instructions on filling out information regarding ‘A&E’ and ‘IDIQ’ Contract Types for Task Orders, see Page 60.**
Create a New Solicitation / Task Order Request

**Step #5**

- After you press “Save & Continue” in the previous step, you will be taken to this page, where you will see the workflow steps of the solicitation process at the top of the page.
- Scroll down to add documents related to the solicitation / task order request.

**Step #6**

- In the Documents section, at the bottom of the page, you will see a “Required Documents” field. Please upload the type of documents that are listed here.
- Before you upload the relevant documents you must select the Document Type in the drop-down menu. In this instance, “Engineer’s Estimate” has been selected.
- After selecting the document type, click on the “Select Files” button to find the relevant file on your computer.
Create a New Solicitation / Task Order Request

**STEP #7**

After you have uploaded all the required documents, you can submit the solicitation / task order request to the first reviewer. In this case, you can click on the “Submit to RM” button to move the process forward to Resource Management.

Alternatively, if you are not ready to submit the solicitation / task order request to the next approver, you can press “Save” and return to the request later.

**EMAIL CONFIRMATION FROM PROTRACK+ TO SOLICITATION REQUEST CREATOR**

Dear Christopher Quay,

The Solicitation Request below has been Submitted to the Resource Management Officer for approval.

SOW Title: 16th Street Bridge Project

Request Number: DOPSOL210602

DC Project Number: 02220A

Division: DMPA

COTR: Donald Cooney

Assigned To:

Created By: Christopher Quay

Click here to login to ProTrack+.

(This is an automated email. Please do not reply)

Thanks,

DOOT CUTE

Once you’ve submitted the solicitation, by following the steps above, you will receive an email from protrackplus-no-reply@dc.gov (see above) confirming that your solicitation / task order request has been submitted to the next party on the approval chain.
Re-Assign Solicitation / Task Order Requests

**STEP #1**

- Go to the ProTrack+ Home Page
- Select “Procurement” tab
- Click on “Inbox - Assigned to You/Group” alongside either the Solicitation Request or Task Order Request sub menu

**STEP #2**

- Find the solicitation / task order request you’re looking for and click on the “Re-Assign” icon
Re-Assign Solicitation / Task Order Requests

**STEP #3**

- Go to the “Assign To” section and click on the drop-down menu in the “Assigned To” field to select who should review the document in the division.
Review Solicitation / Task Order Requests

**STEP #1**

- Go to the ProTrack+ Home Page
- Select “Procurement” tab
- Click on “Inbox - Assigned to You/Group”

**STEP #2**

- Find the solicitation request you want to review and click the “Review” icon
At the top of the page you will see the workflow steps of the solicitation process. The current step that the solicitation process is highlighted in orange.

Scroll down to the Documents section
Select the arrow on the top right to bring up the various documents
Select the ‘Download’ icon alongside the document you want to download
ADD COMMENTS AND SUBMIT TO NEXT REVIEWER

- Scroll down to the bottom of the page.
- Add comments by selecting the “Add Comments” button and then entering text
- Click on the “Revise & Resubmit” to request that the previous person in the workflow chain revise their submission or click “Submit to...” to send it on to the next party in the solicitation workflow
Upload Full Packet / Revised Funding Information

**EMAIL FROM PROTRACK+ REQUESTING REVISED FUNDING / UPLOADING FULL PACKET**

Dear Christopher Quay,

The Solicitation Request below has been sent to you for revise funding.

**SOW Title:** 11th

**Request Number:** OCP5SOL200013

**DC Project Number:** 116216

**Division:** IPMA

**COTR:** Abdulhadi Mohamed

**Assigned To:** Christopher Quay

**Created By:** Christopher Quay

Click [here](#) to login to ProTrack+.

(This is an automated email. Please do not reply)

Thanks,

DOCT QT1

- If the solicitation / task order needs additional documentation to rectify the estimate amount with the amount that has been agreed on when OCP sent the contract out for bid you will receive an email requesting that you submit revised funding (aka, Upload Full Packet)

**STEP #1**

- Go to the ProTrack+ Home Page
- Select “Procurement” tab
- Click on “Inbox - Assigned to You/Group” alongside either the Solicitation Request or Task Order Request sub menu
STEP #2

- Find the solicitation / task order request you want to review and click the “Upload Full Packet” icon

STEP #3

- In the Documents section you will be able to upload different types of documents (“Pre Award Clearance,” “Responses and Rankings” and “Bid Documents”) that are requested by OCP
- Before you upload the relevant documents you must select the Document Type in the drop-down menu. In this instance, “Contract” has been selected.
- After selecting the document type, click on the “Select Files” button to find the relevant file on your computer
- Scroll down to the bottom of the page and click the “Submit to RM” button to send the solicitation / task order to a resource officer or resource analyst
Although there are many similarities between the Solicitation and Task Order creation, review and approval processes in ProTrack+, there are a few unique aspects of the Task Order creation process that are covered below.

Primarily, the one unique aspect of the Task Order creation process is being **required to choose a vendor** if you select either “IDIQ” or “A&E->Sole Source” in the Contract Type field when you create a Task Order.

**Note:** Before following the steps below, please create a Task Order by following the directions on Page 49.

**Special Instructions for Creating a Task Order - Step #1**

- After following the instructions to create a Task Order on Page 49, you will be directed to the screen above.
- Fill out all the fields that are marked with a “*”. **Note: If you need the DC Project Number please refer to the PROMPT system or ask an Office of Contracting and Procurement (OCP) staff member.**
- Click on the “Continue” button
**SPECIAL INSTRUCTIONS FOR CREATING A TASK ORDER - STEP #2**

- Fill out all the fields that are marked with a “*”.
- In the Contract Type field, select either IDIQ or A&E. If you select A&E you have to select either “Request for Qualification” or “Sole Source” from a Solicitation Type field that appears, as well as select an option in the Category field that appears.
- Click the “Save and Continue” button
Create Task Orders - Special Instructions

**SPECIAL INSTRUCTIONS FOR CREATING A TASK ORDER - STEP #3**

- If you selected either “IDIQ” or “A&E->Sole Source” on the previous page you will be prompted to select a contractor.
- Scroll down to the “Contractors” section and click on the checkbox near the contractor that you would like to select
- Click the “Save Changes” button
- Scroll down to the bottom of the page after you’re finished filling out all applicable fields and select either the “Save” or “Submit to CO” button