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Release Summaries

SPMS Version 4.1
SPMS Version 4.0

Contact

Indiana Department of Transportation
100 North Senate Avenue
IGCN Room N801
Indianapolis, IN 46204
(317) 232-5533

Administrator: April Schwering, (317) 232-5466, aschwering@indot.in.gov
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Home

The SPMS application is used for managing Project data and resources, scheduling, estimating, and funding. SPMS Reports summarize data from various perspectives, including current Project activity schedule baseline versus actual dates and actual Project cost versus budget cost.

SPMS includes several levels of security and contains a list of Users (identified by User ID) who can access the program. Access to menu selections, icons, features and fields is dependent on a User’s role and security level. An SPMS Administrator assigns access rights to each of the defined privilege categories.

Home Screen

The SPMS Home Screen contains a link to a list of Project Messages, Announcements, a Search feature and search results. For details on menus, icons and overall screen organization, refer to Understanding the Screen in the Getting Started section.

Project Messages

A following link is provided “You Have (XXXXX) Project Messages” which when clicked will display the Project Messages panel. Project Messages can also be accessed from the menu on the left side of the page under Projects. For more details on project messages, click on the Help icon from the Project Messages page.
Announcements

This section displays any informational announcements.

Project Search

The Project Search feature offers a convenient way to find projects in SPMS. Returned records are displayed in a Search Results Panel where the User may add a Project to their Des Basket, open the Des Maintenance Panel to manage a Project, open the Schedule Edit Panel to maintain the project's schedule, open the Funding Panel to maintain the project's funding, or print a Full Project Listing Report.

Access to menu selections, icons and features is dependent on a User's role and security level. For details, refer to Understanding the Screen in the Getting Started section.

The Search Panel allows the User to either enter a Project's Des #, Contract #, Land Acquisition Code and/or Corridor # and/or use additional criteria to find a specific group of Des Numbers.

To find a Project by its Des #, enter it in the Des # text box and click on the Search icon. Enter the first few numbers in the Designation Number to narrow down the search results. For example, type "00" to return only those Projects beginning with "00".

Enter criteria in the text box and click on the Search Icon Button. For example, to search for Des # 0001250, enter the number in the Des # text box and click "Search" Icon.

The Project displays in the Search Results Panel. Lead Projects display in blue text, Standalone Projects display in orange, and Sub Projects in black.

Additional Search Functions

Clear Search, Save Search, Saved Search List.

Clear Search removes all the selected criteria except for Project Status = "Active".
Save Search allows the user to save selected criteria. The user must select if the search is “New Search” or “Existing Search” and provide a name.

Saved Search List will display a list of previously saved searches. The user may select a search or delete a search.

Search Results

Search Results has the options of: Add All Results to the Des Basket and Export to Excel.

The Des # as displayed from the Search Result gives the following options: Add to Des Basket, Des Maintenance, Edit Schedule, Funding, Full project Listing Report.
Additional Search Panels

To find Projects using criteria, click on the Maximize button to the right of a Search Criteria Panel to see the choices available. The Minimize button replaces the Maximize button so the window may be collapsed and another expanded.

Multiple selections are allowed, but only one Panel may be open at a time. If one is maximized, maximizing another closes it.

For example, to search for Active and Historical Projects in Congressional District 1, maximize the Congressional District Search Criteria Panel and place a checkmark in the checkbox next to District 1.

Then, maximize the Project Status Search Criteria Panel and place a checkmark in the checkbox next to Historical – H (project status defaults to active so it is already checked).

When finished selecting the criteria, click on the Search icon to display the records in the Search Results Panel.

Instructions for common functions such as Viewing Details, Applying Filters, Sorting, Showing More Items per Page, and Exporting to Microsoft Excel may be found in the Getting Started section.
Add Projects to the Des Basket

Click on the Des Basket icon to the right of the record to add the Project to the Des Basket.

Clicking on the Des Basket icon in the Search Results Panel title bar adds all the Projects in the Search Results Panel to the Des Basket. The Des Basket holds a maximum of 200 Projects. If there are more than 200 Projects in the Search Results Panel, they are added to the Des Basket until the maximum is reached. A message displays with notification that only the first 200 Projects were added to the Des Basket.

Designation Numbers in the Des Basket are sorted numerically in ascending order.

Instructions for Working with the Des Basket are found in the Des Basket section.

Access the Project Maintenance Main Page

Click on the Des Maintenance icon to the right of the record on the Search Results Panel to open the Project Maintenance Main Page and manage the Project.
Access Project Schedule Page

Click on “Edit Schedule” icon on Search Results Panel to view Edit Schedule.
Access Project Funding Page

Click on “Funding” 🔄 Icon on Search Results Panel to access Funding Page
### View or Print the Full Project Listing Report

Click on the **Full Project Listing Report** icon to the right of the record on Search Results Panel to open the Full Project Listing Report for that Project.
## INDOT FULL PROJECT LISTING

### Project Milepost

| Project Milepost | Extract Start | Extract Finish | Person Responsible | Phone | Updated Date | Updated ULR
|------------------|---------------|---------------|--------------------|-------|--------------|--------------|
| Start Plan Development | 01/03/2000 | 01/03/2000 | Lisa Caster, Design Squad 4 | 3172533085 | 02/27/2008 | SPMSFN
| Design Survey | 04/02/2000 | 04/02/2000 | Eric Bauschbach, Aerial Engineering | 3179107251 | 02/27/2008 | SPMSFN
| Project Authorized | 03/31/2001 | 03/31/2001 | Eyrn Fletcher, Urban & Corridor Planning | 3172325771 | 02/20/2008 | SPMSFN
| Plan to Tract | 06/16/2002 | 06/16/2002 | Lisa Caster, Design Squad 4 | 3172325771 | 02/17/2011 | SPMSFN
| Professional Services - Notice to Proceed | 01/01/2005 | 01/01/2005 | Jeffrey Clinton, Contracting | 3172324190 | 02/27/2008 | SPMSFN
| Design Approval | 04/12/2001 | 04/12/2001 | Lisa Caster, Design Squad 4 | 3172325771 | 02/20/2008 | SPMSFN
| Right to Pay | 01/20/2001 | 01/20/2001 | Lisa Caster, Design Squad 4 | 3172325771 | 02/20/2008 | SPMSFN
| Professional Services | 01/04/2005 | 07/30/2005 | Jeffrey Clinton, Contracting | 3172324190 | 02/27/2008 | SPMSFN
| Permit Approval | 06/14/2002 | 06/14/2002 | Lisa Caster, Design Squad 4 | 3172325771 | 02/20/2008 | SPMSFN
| Plan Signed | 03/03/2003 | 03/03/2003 | Lisa Caster, Design Squad 4 | 3172325771 | 02/20/2008 | SPMSFN
| Documentation Agreement | 06/30/2002 | 06/30/2002 | M Gallagher, Mobility & Congestion | 3172325771 | 02/27/2008 | SPMSFN
| Railroad Coordination | 01/02/2000 | 01/02/2000 | Albert Hall, Railroad Section | 3172325771 | 02/27/2008 | SPMSFN
| Authorization Funds For CR | 08/03/2003 | 08/03/2003 | Rhonda Emmett, Budget & Forecasting | 3172325771 | 02/27/2008 | SPMSFN
| Collect Project Data | 01/01/1999 | 01/01/1999 | Gregory Koinski, Project Management | 3172324190 | 02/27/2008 | SPMSFN
| Initiate NIHA | 08/01/1999 | 07/31/1999 | Michelle Allen, Environmental Assessment | 3172325771 | 02/27/2008 | SPMSFN
| Traffic Data | 01/01/1999 | 01/01/1999 | Eyrn Fletcher, Urban & Corridor Planning | 3172325771 | 02/27/2008 | SPMSFN
| Develop Preliminary Alternatives | 01/01/1999 | 01/01/1999 | Gregory Koinski, Project Management | 3172324190 | 02/27/2008 | SPMSFN
| Identify Preferred Alternative | 01/01/1999 | 01/01/1999 | Eyrn Fletcher, Urban & Corridor Planning | 3172325771 | 02/27/2008 | SPMSFN
| Authorization Funds For FE | 01/01/1999 | 01/01/1999 | Rhonda Emmett, Budget & Forecasting | 3172325771 | 02/27/2008 | SPMSFN
| Concept Modification (2) | 01/01/1999 | 01/01/1999 | Jeffrey Clinton, Contracting | 3172324190 | 02/27/2008 | SPMSFN
| Engineering Assessment | 01/01/1999 | 01/01/1999 | Eyrn Fletcher, Urban & Corridor Planning | 3172325771 | 02/27/2008 | SPMSFN

### ROAD INFORMATION

- **Transportation System:** Off Federal Aid
- **Urban or Rural:** Rural

### NUMBER OF LANES

- **2**

### CURRENT ACTIVITY

- **5000**

### FUNCTIONAL CLASS

- **Rural Undivided**

### LAND ACQUISITION INFORMATION

- **LAND ACQUISITION CODE:** 4100

### # OF PAVEMENTS

- **20**
The Full Project Listing, Activity Log, Project Log and Project Cost Estimate Log Reports may be created for the records in the Search Results Panel by clicking on Reports on the menu and selecting the report from the dropdown list and the Projects to include in the Report. For more details, refer to Viewing Reports in the Reports section.

When finished searching, use the menu to navigate to another feature. Search Results are not saved.
Getting Started

Online Help Overview

If you are new to online Help, the information below will help you understand how the system works.

Online Help may be accessed from any screen in the SPMS application. When working in a specific SPMS screen, clicking on the Help icon opens the Online Help topic related to that particular screen. For example, if working in Reports, clicking on the Help icon opens the Reports Online Help topic.

From the initial SPMS Home screen, click on the Help icon in the SPMS Title Bar, open the Online Help window.

The Home Help Topic displays on the right side of the Online Help window. The SPMS Help menu on the left side contains links to different sections of the Online Help. Click on the links to open other Online Help topics.
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<td>Home</td>
<td>Overview of SPMS Home page</td>
</tr>
<tr>
<td>Getting Started</td>
<td>General SPMS features</td>
</tr>
<tr>
<td>Capital Budgeting</td>
<td>Call Work Area, Change Management</td>
</tr>
<tr>
<td>Projects</td>
<td>Project Proposals, Project Search, Maintenance, and Contract Management</td>
</tr>
<tr>
<td>Reference Data</td>
<td>Sub-menu options within the Reference Data menu</td>
</tr>
<tr>
<td>System Maintenance</td>
<td>Sub-menu options within the System Maintenance menu</td>
</tr>
<tr>
<td>Reports</td>
<td>Overview of SPMS Reports</td>
</tr>
<tr>
<td>User Guide</td>
<td>A PDF version of the Online Help for printing</td>
</tr>
<tr>
<td>Des Basket</td>
<td>Overview of the Des Basket feature</td>
</tr>
<tr>
<td>Glossary</td>
<td>SPMS Terms and Table and Field Definitions</td>
</tr>
</tbody>
</table>

When maintaining a Project, the Help icon is located either on the Project Maintenance Main Page's icon bar or on the icon toolbar in the individual Project Maintenance Panels.

Project Maintenance Main Page Toolbar

![Project Maintenance Main Page Toolbar](image)

Project Maintenance Panel Icon Toolbar

![Project Maintenance Panel Icon Toolbar](image)

To find a specific term or phrase on any Help Topic screen, use the Windows Find shortcut keys, **CTRL + F**, to open the Find dialog box as shown below. Enter the term in the text box and click on the **Next** button to find the occurrences.
An Online Help topic may be printed by clicking on the Printer icon in the top right-hand corner of the Online Help window.

**SPMS Workflow**

**Setting up the Web Browser**

To set User Authentication so that the User is logged on to the SPMS application automatically:

Select Tools, then Internet Options from the Internet Explorer 8 browser menu.
Click on the **Security** tab to edit the Trusted Sites settings. Then click on the **Custom level** button to customize the security settings.

![Internet Options dialog box](image)

Scroll to the **User Authentication** options and click in the Automatic logon with current user name and password radio button to select it. Click the **OK** button to accept the change and close this dialog box.
Back on the Security tab, click on the Sites button to manually add sites to this zone.

*Note: Takes effect after you restart Internet Explorer*
In the **Trusted sites** dialog box, enter the SPMS Website address and click the **Add** button. Click the **Close** button to close this dialog box.
Logging in to SPMS

To access SPMS externally, type the following URL into the browser's address bar:

https://spms.indot.in.gov

Click in the **INDOT Employees** or **Others** radio button to select. Then, enter **User ID** and **Password** into their text boxes. Click on the **Login** button to open the SPMS Home screen.
If there are any problems logging in to SPMS, click on the Email icon to contact the SPMS Administrator.

*Invalid UserID or Password. Please contact SPMS Administrator*

[Contact SPMS Administrator]
Understanding the Screen

Security

Users are assigned Roles and Tokens giving them permissions to certain features. For example, only System Administrators have access to the System Maintenance menu selections. Users who do not have Reference table maintenance permissions are able to view the tables but the Add and Edit icons are not visible. Users without permissions to certain Project maintenance features see grayed-out records and options on those screens.

Internet Explorer Compatibility View

The icon to the right of the address bar in Internet Explorer 8.0 may be used to switch into Compatibility View, sometimes beneficial in viewing older applications. SPMS and SPMS Help are best viewed in Normal view (NOT Compatibility view). For example, the graphics below show the effect on the SPMS Help menu alignment.
Parts of the Screen

Icon Bar:

- **Home**
- **Help**
- **Search**
- **Email SPMS Administrator/Support**

Icon List
<table>
<thead>
<tr>
<th>Hover Name</th>
<th>Image</th>
<th>File Name (right click/save as name)</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acknowledge Change</td>
<td>![ok16.gif]</td>
<td>ok16.gif</td>
<td>Acknowledges a change to the Des in the Work Area</td>
</tr>
<tr>
<td>Activate</td>
<td>![activate.gif]</td>
<td>activate.gif</td>
<td>Activates a record from Historical to Active</td>
</tr>
<tr>
<td>Activity Log Report</td>
<td>![activitylogreport.gif]</td>
<td>activitylogreport.gif</td>
<td>Displays the Activity Log Report</td>
</tr>
<tr>
<td>Add New</td>
<td>![new.gif]</td>
<td>new.gif</td>
<td>Displays the add panel for a record</td>
</tr>
<tr>
<td>Add Filter</td>
<td>![add_filter.gif]</td>
<td>add_filter.gif</td>
<td>Displays filter input boxes</td>
</tr>
<tr>
<td>Apply Filter</td>
<td>![apply_filter.gif]</td>
<td>apply_filter.gif</td>
<td>Applies (executes) a filter</td>
</tr>
<tr>
<td>Asset Groups</td>
<td>![Activitylogreport16.gif]</td>
<td>Activitylogreport16.gif</td>
<td>Displays the Asset Groups panel</td>
</tr>
<tr>
<td>Assign Contacts</td>
<td>![user.gif]</td>
<td>user.gif</td>
<td>Organization List Position tab</td>
</tr>
<tr>
<td>Assign NBI</td>
<td>![assign_nbi.gif]</td>
<td>assign_nbi.gif</td>
<td>Assigns an NBI Number to a Bridge</td>
</tr>
<tr>
<td>Assign Projects</td>
<td>![projects.gif]</td>
<td>projects.gif</td>
<td>Assigns Projects(Des) to Role ID</td>
</tr>
<tr>
<td>Assign Roles</td>
<td>![role.gif]</td>
<td>role.gif</td>
<td>Panel to assign Roles to a User ID</td>
</tr>
<tr>
<td>Assign Tokens</td>
<td>![icnlogoff.gif]</td>
<td>icnlogoff.gif</td>
<td>Assigns Tokens to Role ID and User ID</td>
</tr>
<tr>
<td>Assign Users</td>
<td>![user.gif]</td>
<td>user.gif</td>
<td>Assigns User ID to Role ID</td>
</tr>
<tr>
<td>Authorize Active Schedule</td>
<td>![auth_act_schedule.gif]</td>
<td>auth_act_schedule.gif</td>
<td>Project Maintenance Main Page of a Proposed Project</td>
</tr>
<tr>
<td>Authorize Provisional Schedule</td>
<td>![auth_prov_schedule.gif]</td>
<td>auth_prov_schedule.gif</td>
<td>Project Maintenance Main Page of a Proposed Project</td>
</tr>
<tr>
<td>Bridge</td>
<td>![bridge.gif]</td>
<td>bridge.gif</td>
<td>Panel with Des Bridge data</td>
</tr>
<tr>
<td>Calendar</td>
<td>![calendar.gif]</td>
<td>calendar.gif</td>
<td>Choose date from a calendar</td>
</tr>
<tr>
<td>Change Position</td>
<td>![hierarchyblue.gif]</td>
<td>hierarchyblue.gif</td>
<td>Organization Panel – Position tab</td>
</tr>
<tr>
<td>Organization</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Change Project Status</td>
<td>![status_change.gif]</td>
<td>status_change.gif</td>
<td>Project Maintenance Main Page or Panel – Change a Project’s status</td>
</tr>
<tr>
<td>Clear</td>
<td>![eraser.gif]</td>
<td>eraser.gif</td>
<td>Clears items</td>
</tr>
<tr>
<td>Conditions</td>
<td>![conditions.gif]</td>
<td>conditions.gif</td>
<td>Panel with Des Condition data</td>
</tr>
<tr>
<td>Congressional District</td>
<td>![congressional_districts.gif]</td>
<td>congressional_districts.gif</td>
<td>Panel with Des Congressional data</td>
</tr>
<tr>
<td>Copy Organization Address</td>
<td>![copyrecord.gif]</td>
<td>copyrecord.gif</td>
<td>Organization Panel – Address tab</td>
</tr>
<tr>
<td>CPM Team</td>
<td>![managers.gif]</td>
<td>managers.gif</td>
<td>Displays the Call Work Area for the CPM Team</td>
</tr>
<tr>
<td>Delete</td>
<td>![delete.gif]</td>
<td>delete.gif</td>
<td>Delete items from the Des Basket or Panel</td>
</tr>
<tr>
<td>Hover Name</td>
<td>Image</td>
<td>File Name (right click/save as name)</td>
<td>Action</td>
</tr>
<tr>
<td>-----------------------</td>
<td>------------------------</td>
<td>--------------------------------------</td>
<td>-----------------------------------------------------</td>
</tr>
<tr>
<td>Des Basket</td>
<td>basket.gif</td>
<td>basket.gif</td>
<td>List of Des numbers frequently maintained</td>
</tr>
<tr>
<td>Des Basket (remove)</td>
<td>delete_basket.gif</td>
<td></td>
<td>Remove Des # from Des Basket</td>
</tr>
<tr>
<td>Des Maintenance</td>
<td>icnedit.gif</td>
<td></td>
<td>Displays the Project Maintenance Panel</td>
</tr>
<tr>
<td>Districts</td>
<td>districts.gif</td>
<td></td>
<td>Panel with Des District data</td>
</tr>
<tr>
<td>Edit</td>
<td>icnedit.gif</td>
<td></td>
<td>Displays the edit panel for a record</td>
</tr>
<tr>
<td>Edit Schedule</td>
<td>edit_schedule.gif</td>
<td></td>
<td>Edit a Schedule</td>
</tr>
<tr>
<td>Email SPMS Admin</td>
<td>mailhover.gif</td>
<td></td>
<td>Email SPMS Support</td>
</tr>
<tr>
<td>Estimates</td>
<td>estimates.gif</td>
<td></td>
<td>Panel with Des Phase/Stage Estimated Costs</td>
</tr>
<tr>
<td>Environmental Clearance</td>
<td>env_clearance.gif</td>
<td></td>
<td>Project Maintenance Main Page or Panel</td>
</tr>
<tr>
<td>Excel</td>
<td>excel.gif</td>
<td></td>
<td>Allows for exporting data to Excel</td>
</tr>
<tr>
<td>Full Project Listing</td>
<td>full_project_listing.gif</td>
<td></td>
<td>Displays the Full Project Listing Report</td>
</tr>
<tr>
<td>Funding</td>
<td>funding.gif</td>
<td></td>
<td>Project Maintenance Main Page or Panel</td>
</tr>
<tr>
<td>General Maintenance</td>
<td>general_info.gif</td>
<td></td>
<td>Project Maintenance Main Page or Panel</td>
</tr>
<tr>
<td>Help</td>
<td>icnHelp.gif</td>
<td></td>
<td>Displays the help document for a specific topic</td>
</tr>
<tr>
<td>Historical</td>
<td>historical.gif</td>
<td></td>
<td>Marks a record as historical</td>
</tr>
<tr>
<td>Hold</td>
<td>hold.gif</td>
<td></td>
<td>Changes an activity’s status to put on hold</td>
</tr>
<tr>
<td>Hold Release</td>
<td>hold-release.gif</td>
<td></td>
<td>Changes an activity’s status to taken off hold</td>
</tr>
<tr>
<td>Home</td>
<td>icnHome.gif</td>
<td></td>
<td>Displays the SPMS Home screen</td>
</tr>
<tr>
<td>Inspection</td>
<td>inspection.gif</td>
<td></td>
<td>Displays Bridge Inspection data</td>
</tr>
<tr>
<td>Items</td>
<td>items.gif</td>
<td></td>
<td>Displays more details on panels</td>
</tr>
<tr>
<td>Lead Project</td>
<td>lead.gif</td>
<td></td>
<td>Project Search – Search Results Panel</td>
</tr>
<tr>
<td>Lock</td>
<td>lock.gif</td>
<td></td>
<td>Propose Project Estimates screen</td>
</tr>
<tr>
<td>Lock Stage/Carry Forward Amount</td>
<td>lock_go.gif</td>
<td></td>
<td>Propose Project Estimates screen</td>
</tr>
<tr>
<td>Locked</td>
<td>lock.gif</td>
<td></td>
<td>Notifies user that a Work Area Des is being edited by another user and is unavailable for editing</td>
</tr>
<tr>
<td>Maintain Bridge</td>
<td>maintainbridge.gif</td>
<td></td>
<td>Maintain an existing bridge</td>
</tr>
<tr>
<td>Maintain Contacts</td>
<td>user.gif</td>
<td></td>
<td>Edit Schedule – Maintain Contacts</td>
</tr>
<tr>
<td>Hover Name</td>
<td>Image</td>
<td>File Name (right click/save as name)</td>
<td>Action</td>
</tr>
<tr>
<td>----------------------------</td>
<td>----------------</td>
<td>--------------------------------------</td>
<td>--------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Maintain Position List</td>
<td>🔄</td>
<td>managers.gif</td>
<td>Maintain the Position list on Activity Codes Panel</td>
</tr>
<tr>
<td>Maintain Position Type</td>
<td>🔄</td>
<td>role.gif</td>
<td>Maintain Position Types on Organization List Position Panel</td>
</tr>
<tr>
<td>Maximize</td>
<td>🔄</td>
<td>plus.gif</td>
<td>Maximize a window</td>
</tr>
<tr>
<td>Minimize</td>
<td>🔄</td>
<td>minus.gif</td>
<td>Minimize a window</td>
</tr>
<tr>
<td>New Bridge</td>
<td>🔄</td>
<td>newbridge.gif</td>
<td>Create a new bridge</td>
</tr>
<tr>
<td>No Records Retrieved</td>
<td>🔄</td>
<td>warning_16.gif</td>
<td>Propose Project Route Details screen</td>
</tr>
<tr>
<td>Normal</td>
<td>🔄</td>
<td>normal.gif</td>
<td>Project Search – Search Results Panel</td>
</tr>
<tr>
<td>Not Applicable</td>
<td>🔄</td>
<td>Notapplicable.gif</td>
<td>Changes an activity’s status to not applicable</td>
</tr>
<tr>
<td>PDF</td>
<td>🔄</td>
<td>pdficon_small.gif</td>
<td>View a Report</td>
</tr>
<tr>
<td>Permits</td>
<td>🔄</td>
<td>permits.gif</td>
<td>Panel with Des Permit data</td>
</tr>
<tr>
<td>Predecessor</td>
<td>🔄</td>
<td>up-down-arrows-orange-outline.gif</td>
<td>Edit Schedule, Maintain Predecessors</td>
</tr>
<tr>
<td>Print</td>
<td>🔄</td>
<td>icnprinter.gif</td>
<td>Print the current window contents</td>
</tr>
<tr>
<td>Print Form</td>
<td>🔄</td>
<td>pdficon_small.gif</td>
<td>Print the Change Management application form</td>
</tr>
<tr>
<td>Processing, please wait</td>
<td>🔄</td>
<td>ajax-loader.gif</td>
<td>Indicates that an action is taking place</td>
</tr>
<tr>
<td>Project Activity Log</td>
<td>🔄</td>
<td>activity_listing.gif</td>
<td>Project Activity Log Report</td>
</tr>
<tr>
<td>Project Log</td>
<td>🔄</td>
<td>proj_log.gif</td>
<td>Panel with Des Log Data</td>
</tr>
<tr>
<td>Project Log Report</td>
<td>🔄</td>
<td>project_log_report.gif</td>
<td>Used for Project Log Report</td>
</tr>
<tr>
<td>Rail Crossing</td>
<td>🔄</td>
<td>rail_crossings.gif</td>
<td>Panel with DES Railroad data</td>
</tr>
<tr>
<td>Re-Calculate</td>
<td>🔄</td>
<td>ReCalculate.gif</td>
<td>Recalculates proposed totals on the Change Management application</td>
</tr>
<tr>
<td>Records Retrieved Successfully</td>
<td>🔄</td>
<td>ok_16.gif</td>
<td>Propose Project Route Details screen</td>
</tr>
<tr>
<td>Refresh</td>
<td>🔄</td>
<td>refresh.gif</td>
<td>Refresh Project Messages, Corporate Route Project Length, Work Area Construction Summaries (gif)</td>
</tr>
<tr>
<td>Remove Filter</td>
<td>🔄</td>
<td>remove_filter.gif</td>
<td>Removes filter input boxes</td>
</tr>
<tr>
<td>Replace Bridge</td>
<td>🔄</td>
<td>replacebridge.gif</td>
<td>Replace a bridge</td>
</tr>
<tr>
<td>Revised</td>
<td>🔄</td>
<td>revised.gif</td>
<td>Changes an activity’s status to revised</td>
</tr>
<tr>
<td>Route and Project Length</td>
<td>🔄</td>
<td>routes.gif</td>
<td>Panel with Des Route data</td>
</tr>
</tbody>
</table>
Navigating in SPMS

Access to menu selections, icons and features is dependent on a User's role and security level. For details, refer to Understanding the Screen in the Getting Started section.

Menu
To access a menu option, hover the mouse over that item. The item changes color and the mouse pointer changes to a hand 🖐️. If a sub-menu is available for a menu option, it automatically displays.

Click on a menu option to open.
When maintaining a Project, links and icons are used to open Panels from the Project Maintenance Main Page. For details, refer to [Project Maintenance Main Page](#) in the Project Maintenance section.

**Panel Pages**

Use the Next button and Previous button to navigate to subsequent pages or use the
dropdown to navigate to a specific page. For example, click on 2 from the dropdown to go to Page 2 of the List.

The Status Bar changes depending on what Panel page is displayed. For example, the Status Bar below displays on Page 2 and shows Items 26 – 50 of 53.

**Items on each Panel Page**
By default, Panels display 10 Items per Page. However, this may be changed.

Click on the Items Per Page dropdown list and select 10, 25, 50 or 100 from the list.

This example shows a Panel displaying 25 items per page.
### Sorting Information

Data in Panels may be sorted in ascending or descending order numerically (smallest to largest or largest to smallest), alphabetically (A to Z or Z to A) or by date and time (oldest to newest or newest to oldest).

Click on the column heading of the field to be sorted. In the example below, the District List is sorted by District Number (ascending) by clicking once on the District Number column heading.

---

<table>
<thead>
<tr>
<th>ID</th>
<th>Code</th>
<th>Sub Code</th>
<th>District Number</th>
<th>District Name</th>
<th>FHWA Area</th>
<th>Status</th>
<th>Status Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>C0</td>
<td>C0</td>
<td>610</td>
<td>Crawfordsville</td>
<td>B1</td>
<td>Active</td>
<td>07/01/1993</td>
</tr>
<tr>
<td>20</td>
<td>C0</td>
<td>C1</td>
<td>611</td>
<td>Terre Haute Sub</td>
<td></td>
<td>Active</td>
<td>07/01/1993</td>
</tr>
<tr>
<td>30</td>
<td>C0</td>
<td>C2</td>
<td>612</td>
<td>Crawfordsville Sub</td>
<td></td>
<td>Active</td>
<td>07/01/1993</td>
</tr>
<tr>
<td>40</td>
<td>C0</td>
<td>C3</td>
<td>613</td>
<td>Fowler Sub</td>
<td></td>
<td>Active</td>
<td>07/01/1993</td>
</tr>
<tr>
<td>50</td>
<td>C0</td>
<td>C4</td>
<td>614</td>
<td>Frankfort Sub</td>
<td></td>
<td>Active</td>
<td>07/01/1993</td>
</tr>
<tr>
<td>60</td>
<td>C0</td>
<td>C5</td>
<td>615</td>
<td>Cloverdale Sub</td>
<td></td>
<td>Active</td>
<td>07/01/1993</td>
</tr>
<tr>
<td>70</td>
<td>C0</td>
<td>C6</td>
<td>616</td>
<td>Veedersburg Sub</td>
<td></td>
<td>Active</td>
<td>07/01/1993</td>
</tr>
<tr>
<td>80</td>
<td>C0</td>
<td>C8</td>
<td>990</td>
<td>Crawfordsville Multiple Sub</td>
<td></td>
<td>Active</td>
<td>07/01/1993</td>
</tr>
<tr>
<td>90</td>
<td>F0</td>
<td>F0</td>
<td>620</td>
<td>Fort Wayne</td>
<td>A2</td>
<td>Active</td>
<td>07/01/1993</td>
</tr>
<tr>
<td>100</td>
<td>F0</td>
<td>F1</td>
<td>621</td>
<td>Warsaw Sub</td>
<td></td>
<td>Active</td>
<td>07/01/1993</td>
</tr>
<tr>
<td>110</td>
<td>F0</td>
<td>F2</td>
<td>622</td>
<td>Elkhart Sub</td>
<td></td>
<td>Active</td>
<td>07/01/1993</td>
</tr>
<tr>
<td>120</td>
<td>F0</td>
<td>F3</td>
<td>623</td>
<td>Fort Wayne Sub</td>
<td></td>
<td>Active</td>
<td>07/01/1993</td>
</tr>
<tr>
<td>130</td>
<td>F0</td>
<td>F4</td>
<td>624</td>
<td>Angola Sub</td>
<td></td>
<td>Active</td>
<td>07/01/1993</td>
</tr>
<tr>
<td>140</td>
<td>F0</td>
<td>F5</td>
<td>625</td>
<td>Wabash Sub</td>
<td></td>
<td>Active</td>
<td>07/01/1993</td>
</tr>
<tr>
<td>150</td>
<td>F0</td>
<td>F6</td>
<td>626</td>
<td>Elkhart Sub</td>
<td></td>
<td>Active</td>
<td>07/01/1993</td>
</tr>
<tr>
<td>160</td>
<td>F0</td>
<td>F9</td>
<td>999</td>
<td>Fort Wayne Multiple Sub</td>
<td></td>
<td>Active</td>
<td>07/01/1993</td>
</tr>
<tr>
<td>170</td>
<td>G0</td>
<td>G0</td>
<td>630</td>
<td>Greenfield</td>
<td>B2</td>
<td>Active</td>
<td>07/01/1993</td>
</tr>
<tr>
<td>180</td>
<td>G0</td>
<td>G1</td>
<td>631</td>
<td>Indianapolis Sub</td>
<td></td>
<td>Active</td>
<td>07/01/1993</td>
</tr>
<tr>
<td>190</td>
<td>G0</td>
<td>G2</td>
<td>632</td>
<td>Greenfield Sub</td>
<td></td>
<td>Active</td>
<td>07/01/1993</td>
</tr>
<tr>
<td>200</td>
<td>G0</td>
<td>G3</td>
<td>633</td>
<td>Cambridge City Sub</td>
<td></td>
<td>Active</td>
<td>07/01/1993</td>
</tr>
<tr>
<td>210</td>
<td>G0</td>
<td>G4</td>
<td>634</td>
<td>Anderson Sub</td>
<td>Historical</td>
<td></td>
<td></td>
</tr>
<tr>
<td>220</td>
<td>G0</td>
<td>G5</td>
<td>635</td>
<td>Tippecanoe Sub</td>
<td></td>
<td>Active</td>
<td>07/01/1993</td>
</tr>
<tr>
<td>230</td>
<td>G0</td>
<td>G6</td>
<td>636</td>
<td>Albany Sub</td>
<td></td>
<td>Active</td>
<td>07/01/1993</td>
</tr>
<tr>
<td>240</td>
<td>G0</td>
<td>G9</td>
<td>999</td>
<td>Greenfield Multiple Sub</td>
<td></td>
<td>Active</td>
<td>07/01/1993</td>
</tr>
<tr>
<td>250</td>
<td>L0</td>
<td>L0</td>
<td>640</td>
<td>LaPorte</td>
<td>A1</td>
<td>Active</td>
<td>07/01/1993</td>
</tr>
</tbody>
</table>
To re-sort (descending), click again on the column heading.

By default, Panels display sorted by the first column, which is typically ID/Number, Code, or Year.

Sorts are not saved. The next time the Panel is opened, it is sorted by the first column.

Filtering Information

Data in Panels may be filtered so only particular content displays. For example, the District List Panel below shows that there are 53 records. A filter may be applied so that only those Districts with a Code = “CO” are shown in the list.
To create the Filter, click on the Add Filter icon below the title bar. A filter opens with the left-most column, “ID”, selected in the dropdown list as shown below.

To change this Filter, select the new column, “Code”, from the dropdown menu.

Then, select the operator, “=” from the dropdown menu and enter the value, “CO”, in the text box (not case-sensitive).
the results

<table>
<thead>
<tr>
<th>Operator</th>
<th>Description</th>
<th>Filter Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;</td>
<td>Less than</td>
<td>Enter a value below which all values are included in the results</td>
</tr>
<tr>
<td>&gt;</td>
<td>Greater than</td>
<td>Enter a value above which all values are included in the results</td>
</tr>
<tr>
<td>&lt;=</td>
<td>Less than or equal to</td>
<td>Enter a value below which all values are included in the results, including the value entered</td>
</tr>
<tr>
<td>&gt;=</td>
<td>Greater than or equal to</td>
<td>Enter a value above which all values are included in the results, including the value entered</td>
</tr>
</tbody>
</table>

The completed Filter is shown below.

To apply the Filter, press **Enter** or click on the **Apply Filter** icon.

The filtered list of 8 records is shown below.

![District List Panel](image)

To remove the Filter, click on the **Remove Filter** icon and then click on the **Apply Filter** icon. The complete **District List Panel** of 53 records displays again.
Applying Multiple Filters

To apply more than one Filter to the List, leave the first filter open, select either **AND** or **OR** from the Filter dropdown list, and click the **Add Filter** icon.

![Filter: AND](image)

Enter the second Filter and press **Enter** or click on the **Apply Filter** icon. The Filter appears below the previous one and the List updates to reflect all applied Filters. Repeat to add as many Filters as necessary.

![Code: C0 District Number: 5](image)

Viewing Details

List Panels contain information about each record. More details are available by clicking on the **View Details** icon to the right of the record.
The Details window displays the data from the Panel as well as other fields. The Special Route List example shows **Route Type Code**, **County Code**, and the User Name and Date reflecting the record’s creation and latest update.

Click the **Print** icon to print the details.
Information in Panels may be exported to Excel by clicking on the Export to Excel icon in the title bar of the Panel.

At the File Download dialog box, click on the Open button to view the data in Excel or click on the Save button to save the data in an Excel file.

If saving, choose the location to store the file and click on the Save button.

By default, the file is named X List where X is the name of the Panel and the file type is Microsoft Excel 97-2003 Worksheet.
The download’s progress displays in a dialog box, as shown below. When complete, click on the Open button to view the data in Excel, click on the Open Folder button to open the file’s location, or click on the Close button to exit without viewing the file.

Unless a Filter has been applied, every record in the list is exported. This may take some time to download. Instructions for Applying Filters may be found in the Getting Started section.
Whether viewing or opening from a saved file, the data displays in Microsoft Excel.
Capital Budgeting

Call Work Area

An SPMS Call Work Area is a place for individuals to work collectively on a set of projects to set a transportation program for a given year. From the Call Work Area, users may add a Call Work Area, Work a Call Work Area, and Transfer a Call Work Area. The first step in the lifecycle of a typical Call Work Area is to create the call work area.

To access the Call Work Area, select Call Work Area from the Capital Budgeting menu.

Access to menu selections, icons, features and fields is dependent on a User’s role and security level. For details, refer to Understanding the Screen in the Getting Started section.

There are two tabs on the Work Area panel, the Team Work Area and the User Work Area. The screen defaults to the Team Work Area, and most activities will be performed in the Team Work Area. See the User Work Area section for additional information on the User Work Area.

Instructions for common functions such as Viewing Details, Applying Filters, Sorting, Showing More Items per Page, and Exporting to Microsoft Excel may be found in the Getting Started section.
Team Work Area

The Team Work Area table displays the Call Year, Name, Exec Review Complete, and Status.

<table>
<thead>
<tr>
<th>Call Year</th>
<th>Name</th>
<th>Exec Review Completed</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>2017 Call Work Area</td>
<td>No</td>
<td>Active</td>
</tr>
<tr>
<td>2012</td>
<td>Work Area 2012</td>
<td>No</td>
<td>Active</td>
</tr>
<tr>
<td>2011</td>
<td>WA 2011</td>
<td>No</td>
<td>Active</td>
</tr>
<tr>
<td>2010</td>
<td>WA WORK Area</td>
<td>Yes</td>
<td>Historical</td>
</tr>
</tbody>
</table>

The Call Year column is the year associated with the Call Work Area and is established when the Work Area is created.

The Name column is the name associated with the Work Area and is established when the Work Area is created.

The Exec Review Completed column indicates if the Executive review for the Work Area is complete and is automatically set by where the Work Area is in the review process. Once Exec Review Completed is Yes, the Status will change to Historical and no further editing of the Call Work Area is allowed.

The Status column indicates if a Work Area is Active or Historical. If the Work Area has been reviewed by the executive staff, then the status is Historical; if the Work Area is still in the review process its status is Active.

The following functions may be performed in the Team Work Area, Add New, View Details, Edit, Asset Groups, CPM Team, Work Area Flow.

Instructions for common functions such as Viewing Details, Applying Filters, Sorting, Showing More Items per Page, and Exporting to Microsoft Excel may be found in the Getting Started section.

Click the Add New icon to add/create a new Call Work Area. See Add/Create a Call Work Area for additional details.

Click View Details to view basic details on a Call Work Area. Clicking the icon will open a window with the following information: Call Year, Save Name, Review Completed, Status, Created By (who created the Call Work Area), Created On (when the Call Work Area was created), Updated By (the last user to update the Work Area) and Updated On (when the Work Area was updated). Click the Close Window button to return to the Call Work Area home screen.
Click Edit to edit basic details on the Call Work Area. See Edit the Call Work Area for more details.

The Asset Groups icon displays the Asset Groups associated with a Call Work Area. See Access the Call Work Area for more details on Asset Groups.

The CPM Team icon allows the CPM Team to access the Call Work Area.

The Work Area Flow icon displays the history of transferred ownership of the Call Work Area. See Work Area Flow for more details.

**Add/Create a Call Work Area**

From the Call Work Area panel, click on the Add New icon to the right of the Status column heading.
Access to menu selections, icons, features and fields is dependent on a User’s role and security level. For details, refer to Understanding the Screen in the Getting Started section.

In the **ADD Screen Mode**, enter information as needed.

Field values that are grayed out are auto-populated, and therefore **NON-EDITABLE**. Fields with a peach background are **REQUIRED**. Fields with no background color are **OPTIONAL**.

Click on the **Save** button to save the new record and return to the Work Area Panel or click on the **Cancel** button to exit without saving. If saving, click on the **OK** button at the confirmation message.
SPMS will not save the record or leave the **ADD Screen Mode** if a required field is left empty. Instead, a red **asterisk (\*)** will appear to the right of the field and the cursor will blink inside the field.

![Call Year](image)

SPMS does not allow duplicates. If the Call Year or Name already exists in the database, a message displays.

![Message](image)

Call Year already exists.

The user will be returned to the Call Work Area Panel and the new Call Work Area will be displayed.

<table>
<thead>
<tr>
<th>Call Year</th>
<th>Name</th>
<th>Exec Review Completed</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>2017 Call Work Area</td>
<td>No</td>
<td>Active</td>
</tr>
<tr>
<td>2012</td>
<td>Work Area 2012</td>
<td>No</td>
<td>Active</td>
</tr>
<tr>
<td>2011</td>
<td>WA 2011</td>
<td>No</td>
<td>Active</td>
</tr>
<tr>
<td>2010</td>
<td>WA Work Area</td>
<td>Yes</td>
<td>Historical</td>
</tr>
<tr>
<td>2009</td>
<td>Work Area 2009</td>
<td>No</td>
<td>Active</td>
</tr>
</tbody>
</table>

**Edit The Call Work Area**

From the Work Area panel, click on the **Edit** icon located to the right of the record.
The Edit icon will only appear if the Call Work Area Status is Active.

Clicking the **Edit** icon will open a panel that allows a user to edit the name of the Call Work Area.

Field values that are grayed out are auto-populated, and therefore **NON-EDITABLE**. Fields with a peach background are **REQUIRED**. Fields with no background color are **OPTIONAL**.

Click on the **Save** button to save the edited record and return to the **Call Work Area Panel** or click on the **Cancel** button to exit without saving. If saving, click on the **OK** button at the confirmation message.
SPMS does not allow duplicates. If the Name already exists in the database, a message displays.

Access The Call Work Area
Once a Call Work Area has been created, the Asset Groups and CPM Team may access the Call Area. From the Work Area panel, Asset Team members may click on the Asset Group icon and a panel displays the Asset Group panel.

From the Work Area panel, CPM Team members may click on the CPM Team icon. The Work Area Maintenance screen will directly pop up.

The Asset Groups Panel will display the different Asset Groups associated with the Call Work Area, the current Owner of the Call Work Area for a specific Asset Group and the following potential options: Add, View Details, Edit, Delete.
Clicking **View Details** will provide basic information on the specific Asset Group.

Clicking **Edit** will open the Work Area Maintenance screen. See [Add Projects to Call Work Area](#) and [Work Area Maintenance](#) for information on adding, viewing and editing projects in the Work Area.

To delete an Asset Group, click the **Delete** icon. A message will appear verifying the user wants to delete the Asset Group. Click on the **OK** button to delete the Asset Group and return to the **Call Work Area** and **Asset Groups Panels** or click on the **Cancel** button to exit without deleting. If deleting, click on the **OK** button at the confirmation message.
The removed Asset Group should no longer be visible in the Asset Group Panel. An Asset Group may only be deleted if there are no projects associated with the Asset Group. If attempting to delete an Asset Group that is associated with projects, the following error message will display.

Add An Asset Group
All Asset Groups in the Asset Group code table at the time the Call Work Year is created will automatically be assigned to the Work Area.

From the Call Work Area screen, click on the Asset Group icon in the Work Area Panel.

Click the Add New Asset Group icon to the right of the Owner column.
In the **ADD Screen Mode**, select an Asset Group from the dropdown list.

Field values that are grayed out are auto-populated, and therefore **NON-EDITABLE**. Fields with a peach background are **REQUIRED**. Fields with no background color are **OPTIONAL**.

Click on the **Save** button to save the new record and return to the **Work Area** and **Asset Groups Panels** or click on the **Cancel** button to exit without saving.

SPMS will not save the record or leave the **ADD Screen Mode** if a required field is left empty. Instead, a red **asterisk (**) will appear to the right of the field and the dropdown menu will be highlighted.

---

**Work Area Flow**

The **Work Area Flow** icon displays the history of transferred ownership of the Call Work Area. Clicking the icon will open the Call Year Work Area Flow.
The most recent ownership is displayed at the top of the table.

The **Asset Group** column indicates which Asset Group was involved in the transfer process.

The **From** column indicates who held the ownership. The **To** column indicates to whom the Work Area was transferred. The **On** column indicates the date of the ownership transfer.

The last column has a **View Details** icon that displays additional information on the ownership transfer and allows for the printing of those details. Click on the icon to pop open a window that lists the Asset Group, the Transferred Ownership From, the Transferred Ownership To, the Created By (who transferred the ownership), and the Transferred Ownership On (date of the ownership transfer). Click the **Close Window** icon to return to the Call Year Work Area Flow home screen.
Click **Back to Call Work Area** at the top of the Panel to return to the Call Work Area home screen.

**User Work Area**

The User Work Area allows Work Area users to take a snapshot of the Work Area at a particular time. This snapshot is of the entire Work Area at that particular moment – what the Work Area looks like across all Asset Groups and CPM Teams.

To access the User Work Area, from the Work Area panel click on the **User Work Area** tab.

The **User Work Area** panel will display the Call Year, Saved Report Name, Saved By columns.
Instructions for common functions such as Viewing Details, Applying Filters, Sorting, Showing More Items per Page, and Exporting to Microsoft Excel may be found in the Getting Started section.

The Call Year column displays the Call Year for the Work Area.
The Saved Report Name displays the name given to the report when it was created. Users should name the User Work Area something specific and descriptive.
The Saved By column displays the name of the user who last saved/updated the report.

Users may Add New, View Details, Edit, Delete, and View Report.
To create/add a Saved Report in the User Work Area, click on the Add New icon. The Add screen will appear under the User Work Area panel.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.

Select the Call Year from the drop down, enter the Saved Report Name and click Save or Cancel. The message below will appear if Save was selected; click OK to return to the User Work Area panel.
SPMS will not save the record or leave the **ADD Screen Mode** if a required field is left empty. Instead, for drop down fields a red asterisk (*) will appear to the right of the field and the drop down will be highlighted, or for text fields the cursor will blink inside the field.

The most recent Saved Report Name will display at the top of the panel.

The **View Details** allows users to view additional details on the Saved Report Name. Click **View Details** and a window will pop open with details; Call Year, Saved User Name, Save Name, Review Completed, Status, Created By, Created On, Updated By, and Updated On. Click the **Close Window** button to close the details and return to the User Work Area.
The **Edit** icon allows users to edit the Saved Name Report field. Users may only edit records they have created. Click **Edit**, and the Edit screen will appear under the User Work Area panel.

Field values that are grayed out are auto-populated, and therefore **NON-EDITABLE**. Fields with a peach background are **REQUIRED**. Fields with no background color are **OPTIONAL**.

Edit the name of the report and click **Save** to save the changes or **Cancel** to exit. The message below will appear if save is selected; click **OK** to return to the User Work Area panel.
SPMS will not save the record or leave the **EDIT Screen Mode** if a required field is left empty. Instead, a red *asterisk* (*) will appear to the right of the field and the cursor will blink inside the field.

The **Delete** icon allows users to delete a Saved Report Name. Users may only delete Saved Report Names they created. Click Delete and the message below will appear. Click **OK** to delete the report and return to the User Work Area panel, or **Cancel** to return to the User Work Area without deleting the report.

The **View Report** icon allows users to view a report of the Work Area at the time the report was saved. Users may view any other user’s saved report. Click **View Report**, and the Select Asset Groups panel appears. Select the Asset Groups to include in the report and click **View Report** to view the report or **Cancel** to return to the User Work Area panel.
A new window will open with a PDF of the Work Area for the selected Asset Groups.

Work Area Maintenance

After following the steps to access the Call Work Area, the Work Area Maintenance screen will open in a new window.
Access to menu selections, icons, features and fields is dependent on a User’s role and security level. For details, refer to Understanding the Screen in the Getting Started section.

Instructions for common functions such as Viewing Details, Applying Filters, Sorting, Showing More Items per Page, and Exporting to Microsoft Excel may be found in the Getting Started section.

The Header

The Header will display the Call Year of the selected Call Work Area, the View which indicates the role of the user viewing the Work Area Maintenance, the Asset Group of the Work Area Maintenance (empty for CPM Team), and the Owner of the Work Area at the current time (either the Asset Team, blank if it’s CPM Team or Executive).

The Work Area Construction Amount Summary

The Work Area Construction Amount Summary provides a quick look at Team Approved CN Estimates. The Call Year defaults to the Call Work Area Call Year, but if projects from other years are included in the Call Work Area, clicking on the drop down to the right of Call Year and then clicking the Refresh.
Summary will allow for viewing the summary of alternate years. For Asset Teams, the **Asset Group** drop down will only display the Asset Group of the user. For CPM Teams, the Asset Group drop down default to display all Asset Group projects, but the view may be narrowed by clicking on the drop down to the right of **Asset Group**, selecting the desired Asset Group and then clicking the **Refresh Summary** icon.

The Work Area Construction Amount Summary lists the Team Approved CN Estimates of the projects in the Call Work Area by both the Asset Team and CPM Team for the selected Call Year and then for all other years. The default view is the Team Approved CN Estimates for all districts at the top of the chart, and then separated by individual districts below. After making changes to the Call Year or Asset Group as described above and then clicking Refresh Summary, the Team Approved CN Estimates in the chart will change as required.

The Team Approved CN Estimates come from the Team Approved CN Estimates listed on the Des and are totaled according to the value in the Asset Team Program Year and CPM Team Program Year. To change the Team Approved CN Estimates, follow the steps listed in the Work Area Projects Edit section.

Users can minimize the Work Area Construction Amount Summary by clicking on the **Minimize** icon at the top of the section. A **Maximize** icon will replace the Minimize icon, and all the district information will be hidden but an All Districts total will remain visible. To expand the view, click on the **Maximize** icon and each individual district will be visible again.

**Work Area Projects**

The Work Area Projects section will list the projects associated with the Asset Group and Call Year.
The **Save & Refresh Summary** button will save all changes made to the work area and refresh totals.

The **Show/Hide Columns** button will allow a user to choose which columns are visible and hidden in the Work Area Projects panel. Click on the Show/Hide Columns button. A new window will appear with a list of all the available columns to show/hide. The default view is for all columns to be visible. The Des # and Contract # must always be visible. Any other columns with a check mark in the “Show” column box will be visible. To hide a column, click in the “Show” box so that there is no check mark. When finished with all selections, click the **Submit** button to save changes or the **Cancel** button to return to the previous screen. To undo selections or change what is visible, click on the **Show/Hide Columns** button again and check/uncheck the desired columns.

Clicking in a column header will allow the user to sort the records in the panel by the selected column. Click once to sort the records by the column in ascending order; click the column header again to sort the records by the column in descending order. Additionally, users may click on the **Filter** button under each column header to narrow results by the selected search terms. Click on the **Filter** button, select your desired filter method and then enter the terms in the text field to the right of the **Filter** button.
The first two columns, **AT Include Project In Total** and **CPM Include Project In Total** control what numbers are tallied in the Work Area Construction Amount Summary. All projects are checked by default. To remove a project from being included in the Summary, click on the check box next to the Des number under the Include Project In Total column to remove the check mark and then click the **Save & Refresh Summary** button. To add a project back into the Summary, click on the box next to the Des number to add a check mark back and then click the **Save & Refresh Summary** button to update totals.

The Asset Team will only be able to edit check marks in the **AT Include Project In Total** column; the other column will be grayed out and not editable. Likewise, the CPM Team will only be able to edit check marks in the **CPM Include Project In Total** column.

If the **Save & Refresh Summary** button is not clicked, the selections you uncheck/check will not be saved and will be lost when the user leaves the Call Work Area.

The next column allows for **Add New** projects, **View Details**, **Edit**, **Delete**, **Set Review Date**, **Acknowledge Change**, **Send Project Back to Asset Team**, and potentially a **Locked** icon.

Access to icons in this section depends on where the Work Area is in the review process. If the Work Area is still with the Asset Team, they will have access to all of the icons described above except **Send Project Back to Asset Team** and **Locked**. Once the Work Area is transferred to the CPM Team, Asset Team will only have access to View Details. CPM Team will have access to **View Details**, **Edit**, **Send Project Back to Asset Team**, and potentially **Locked**. See **Transferring the Work Area** for more information on transferring the Work Area. The **Acknowledge Change** icon only appears when SPMS Des information has been updated.

See the **Add Projects to Call Work Area** section for information on how to use the **Add New** icon and add projects to the Work Area.
The View Details icon will provide much of the same information for the Des in a column format (instead of a row), with the additional information of who added the project to the Work Area, when it was added, who made the most recent update to the Work Area Des and when that update was made. The information is not editable.

The Edit icon allows Asset Group members to edit a few select fields related to the Des in the Work Area. Any changes made are only viewable in the Work Area and are not visible when the Des is viewed through the Home screen search function.

The information is not editable.

Only several select fields are editable in the Work Area Projects area. To make changes to the Des that are viewable to everyone, or to make changes to things such as Route, Location, etc., follow the instructions as listed in the Project Maintenance section.

Clicking the Edit icon opens a new window. The Des number displays at the top and is not editable. The rest of the information is automatically pulled from the most recent information associated with the Des in the Work Area.

When the Asset Team is the Work Area owner, Team Adjusted Grade, Asset Program Year and Team Adjusted Construction Phase Estimate are all required fields and must have an entry in order to save changes. Check or uncheck the box next to AT Include Project In Total to include/exclude the project from Summary totals. Click on the drop down next to Team Adjusted Grade in order to select a grade for the project. Click in the field next to Asset Program Year, Team Adjusted Construction Phase Estimate or Asset Team Project Grouping to manually change those fields. The Asset Team Review Date is set automatically to the current date.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.

Click on the Save button to save the changes and return to the Work Area, or click on the Cancel button to exit without saving. If saving, click on the OK button at the confirmation message.
SPMS will not save the record or leave the EDIT Screen Mode if a required field is left empty. Instead, for drop down fields a red asterisk (*) will appear to the right of the field and the drop down will be highlighted, or for text fields the cursor will blink inside the field.

When the CPM Team is the Work Area owner, Team Adjusted Project Status and CPM Team Program Year are required fields and must have an entry in order to save changes. Check or uncheck the box next to CPM Include Project In Total to include/exclude the project from Summary totals. Click on the drop down next to Team Adjusted Project Status in order to change the status for the project. Click in the field next to CPM Grade or CPM Project Grouping to manually change those fields.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL..

Click on the Save button to save the changes and return to the Work Area, or click on the Cancel button to exit without saving. If saving, click on the OK button at the confirmation message.
SPMS will not save the record or leave the EDIT Screen Mode if a required field is left empty. Instead, a red asterisk (*) will appear to the right of the field and the cursor will blink inside the field.

The Delete icon will remove a project from the Work Area, but will NOT delete the Des from the SPMS system.

Click the Delete icon to delete a project from the Work Area. A message will appear asking “Are you sure you want to delete this record?” Click OK to delete the record from the Work Area and return to the Work Area, or click Cancel to return to the Work Area without deleting the Des.

To add a Des back to the Work Area, follow the steps as listed in the Add Projects to Call Work Area section.

The Set Review Date icon will set a review date for the Des. Clicking on that icon will set a review date in the Asset Team Review Date column. This option is best for setting a review date when no changes to the Des are necessary and the project is ready to be transferred to the CPM Team. Changes made to a Des in the Project Maintenance screen will carry over to the Work Area. When a change has been made, the field(s) that change (or changes) was made in will be highlighted in gray and the Acknowledge Change icon appears in the Add New column. Hovering the cursor over the grayed field will display the previous information in that field.
If several changes happened on the same Des number, clicking the Acknowledge Change ☑ icon will accept ALL the changes for the Des.

Click the Acknowledge Change ☑ icon to accept the change(s). The screen will refresh, the grayed field will return to its standard color and when hovering the cursor over the changed field, only the new information will display.

The Locked 🛠 icon will appear when another Asset Team member is editing a Des record at the same time the user is viewing the Work Area. When the Locked icon is viewable, a Des is not available for editing in the Work Area. Once the other user has saved or canceled out of the Des edit screen, the Locked icon will disappear and the user may edit the Des.

For information on the Send Project Back To Asset Team 🔄 icon, see the Transferring the Work Area - CPM Team to Asset Team section.

The following fields are pulled from the Des number record, and are not editable in the Work Area: Des #, Contract #, Route Name, Location, District, Asset Group, Special Funding, Work Type, Work Category, Score, Prog Year, Project Grand Total, CN Phase Est. and Project Status. The Initial Grade column is auto populated when the Des is imported into the Work Area, and is not editable in the Work Area.

The Team Adjusted Grade column is set by the Asset Team by clicking the Edit icon in the Work Area and following the steps to edit the grade.

The Asset Team Prog Year and CPM Prog Year default to the Prog Year selected in the Des, but may be edited by clicking the Edit icon in the Work Area and following the steps to edit the year. The Asset Team is the only group that may edit the Asset Team Prog Year and the CPM Team is the only group that may edit the CPM Prog Year.

The Team Adjusted CN Phase Est. defaults to the Des CN Phase Est., but may be edited by clicking the Edit icon in the Work Area and following the steps to edit the CN Phase Est. The Asset Team Project Grouping and CPM Project Grouping are empty by default, but may be edited by clicking the Edit icon in the Work Area and following the steps to edit the Project Grouping. The Asset Team is the only group that may edit the Asset Team Project Grouping and the CPM Team is the only group that may edit the CPM Project Grouping.

The Asset Team Review Date is empty by default, but may be set by clicking the Set Review Date ☑ icon or by clicking the Edit 🆙 icon in the Work Area and editing the Des record.

The Comments field is set to N (none) by default. Click on the N icon to add comments. The N will change to a Y once a comment is added. See Work Area Maintenance Comments for more information.
The Owner column is set by who has ownership of the Work Area, and may not be edited in the Work Area.

After projects have been transferred from the Asset Team to the CPM Team for review, if the CPM Team decides to return a project to the Asset Team for further review that Des row will be highlighted in yellow when the Asset Team views the Work Area. The Asset Team will only be able to edit the project when the Work Area is transferred from the CPM Team back to the Asset Team. See Transferring the Work Area – CPM Team to Asset Team for more information.

Add Projects to Call Work Area

Once a Call Work Area has been created, Asset Group Team Leaders add projects to the Work Maintenance Area for review, discussion, and finally transfer to the CPM Team.

Access to menu selections, icons, features and fields is dependent on a User’s role and security level. For details, refer to Understanding the Screen in the Getting Started section.

To add projects to a Call Work Area, select Home.

Complete a Project Search for applicable projects. Using the Asset Group and Program Year search fields under the More Fields search area will help to refine search results.
Refer to the Project Search help documents for information on searching for projects.

Asset Group Team Leaders may only add projects that are associated with the same Asset Group as the Asset Group Team Leader. For example, the Bridge Asset Group Team Leader may not add projects to the Bridge Call Work Area that are classified as “Roadway” or “Mobility”. All projects that meet the search criteria will be returned, but only those associated with the Asset Group Team Leader’s Asset Group will be available for addition to the Call Work Area of that Asset Group.

Once a list of projects has been returned, select Call Work Area from the Capital Budgeting menu.

From the Call Work Area screen, click on the Asset Group icon in the Work Area Panel.
Click the **Edit** icon next to the appropriate Asset Group.

Click the **Add New** icon to the right of the **CPM Include in Project Total** column.

A list of the projects from the Project Search Results page will appear. Use the **Select All** button to select all projects, **Clear All** to deselect all projects, or click on individual des numbers to select/deselect specific projects. When finished selecting projects click **Submit** to add selected projects to the Work Area or click **Cancel** to return to the Work Area without adding any projects. If a project returned in the search has already been added to the Work Area, it is not allowed to be added again.
Refer to the Project Search help documents for information on searching for projects.

Once projects have been added successfully, the following message will appear.

Upon returning to the Work Area, a list of the selected projects will be visible. For more information on the Work Area, see Work Area Projects.
Once a Work Area has been created, additional projects may be added to the Call Work Area by following the steps to Add Projects to a Work Area (as described above).

It is critical to get as many projects as possible into the Call Work Area on the first project creation. Additional projects may be added at a later time, but the grade of the newly added projects will not be as accurate as those projects originally added. SPMS will look at the scores of newly added projects, find the score most closely associated with it among the existing Call Work Area projects and assign the new project the same letter grade. Assigning a Grade is more accurate and effective if all projects are imported at one time.

After clicking the Add New + icon to the right of the CPM Include in Project Total column, if a project is already included in the Call Work Area it will appear grey and will not be available for adding to the Call Work Area. All other projects that do not currently exist in the Call Work Area will be available for selection and addition.

**Transferring the Work Area**

As Asset Teams, CPM Teams and Executives finish their individual reviews of the Work Area; they need a way to transfer the Work Area between teams in order to keep the review process moving forward. The sections below explain how those transfer processes work.
Asset Group to CPM Team

Once the Asset Group has completed their review, conversations and decisions related to the projects in the Work Area, the Work Area is ready to be transferred to the CPM Team for review.

Different Asset Groups may transfer their individual Work Areas at different times. For example, the Bridge Group may transfer their Work Area at a time before or after the Mobility Group.

See the Call Work Area for information on how to enter the Work Area.

Every project must have a Review Date set and a Team Adjusted Grade assigned in order for the Transfer WA to CPM Team button to appear.

Review dates are set in two ways. The first way to set a review date involves a member of the Asset Group clicking on the Edit icon in the Des row and making and saving changes to the Des. See Work Area Projects for information on editing a Des. Once the changes are saved, a review date is set in the Asset Group Review Date column. This method is best when there are changes to a Des Team Adjusted Grade, the Asset Program Year, the Team Adjusted Construction Phase Estimate or the Asset Group Project Grouping.

The other way to set a review date is to click on the Set Review Date icon in the Add New column. Click on that icon will set a review date in the Asset Group Review Date column. This method is best for when no changes to the Des are necessary and the project is ready to be transferred to the CPM Team.

If any of the requirements for transferring the Work Area are not met, an error message will appear with a description of the problem that needs correction before the Work Area may be transferred.

If there are no problems, the Work Area will transfer to the CPM Team and the message below will appear.
The screen will return to the Work Area Maintenance, but the Add New icon will not be visible, and the only available option will be to View Details. Asset Group members will be able to add comments in the Comments column. The Owner column will display CPM instead of Asset Team, and on the Asset Groups section of the Call Work Area the Owner will change from Asset Team to CPM Team.

### CPM Team to Asset Team

Once an Asset Group transfers their Work Area to the CPM Team, the CPM Team leader will receive an email notifying them of the change in ownership.

When the CPM Team enters the Work Area, the CPM Team will see all projects in all Asset Groups displayed in the Work Area Construction Amount Summary and the Work Area Projects sections.
When the CPM Team is the Work Area owner, the **Send Project Back To Asset Team** icon allows the CPM Team to send the Des back to the Asset Team. Click on the **Send Project Back To Asset Team** button to send the project back to the Asset Team Work Area for further review and consideration. A new window will appear prompting the CPM Team user to add a comment as to why the project is being transferred back to the Asset Team. Enter text into the comment field and click **Save** to send the project back to the Asset Team, or click **Cancel** to return to the Work Area without transferring the project.

Field values that are grayed out are auto-populated, and therefore **NON-EDITABLE**. Fields with a peach background are **REQUIRED**. Fields with no background color are **OPTIONAL**.

After clicking **Save**, the message below will appear. Click **OK** to return to the Work Area.
SPMS will not save the record or leave the EDIT Screen Mode if a required field is left empty. Instead, a red asterisk (*) will appear to the right of the field and the cursor will blink inside the field.

Upon returning to the Work Area, a Transfer WA To Asset Team button will appear.
If the CPM Team has completed the steps to send the project back to the Asset Team, the row of the project marked Send to Asset Team For Review will be highlighted yellow for the Asset Team when they view the Work Area, but the Asset Team will not be able to edit the project until the CPM Team clicks the **Transfer WA To Asset Team** button. The Asset Team Review Date column will also be reset as empty until the Asset Team sets a new review date.

If the **Mark WA Ready for Exec Review** button was visible to the CPM Team, clicking on the **Send to Asset Team For Review** button will change the **Mark WA Ready for Exec Review** button into a **Transfer WA To Asset Team** button.

Click on the **Transfer WA To Asset Team** button to send the Work Area back to the Asset Team for review and editing. When the button is clicked, a pop up will appear allowing the CPM Team user to select which Asset Group Work Area to transfer.

All Asset Teams associated with the Work Area will be listed, but only the Asset Teams with projects that have been marked **Send Project Back to Asset Team** will be available for transfer.

Select the Work Area(s) to transfer and click **Save** to send the Work Area back to the Asset Team, or click **Cancel** to return to the Work Area without transferring the Work Area.

Upon returning to the Work Area, the CPM Team will only be able to View Details on Des projects and the **Mark WA Ready for Exec Review** and **Transfer WA to Asset Team** buttons will not be visible until the Work Area is transferred back from the Asset Team to the CPM Team. The Owner column will change from CPM Team to Asset Team, and on the Asset Groups section of the **Call Work Area** the Owner will change from CPM Team to Asset Team.
Once an Asset Group transfers their Work Area to the CPM Team, the CPM Team leader will receive an email notifying them of the change in ownership. When the CPM Team enters the Work Area, the CPM Team will see all projects that have been transferred to them displayed in the Work Area Construction Amount Summary and the Work Area Projects sections.

**CPM Team to Exec Review**

Once an Asset Group transfers their Work Area to the CPM Team, the CPM Team leader will receive an email notifying them of the change in ownership.
See the Call Work Area for information on how to enter the Work Area.

See Work Area Projects for information on the columns and icons available to the CPM Team in the Work Area Projects section.

Once the CPM Team has reviewed the projects and is ready to transfer the Work Area to the Executive Team for review, they may click on the Mark WA Ready for Exec Review button.

All Asset Group projects must be transferred to the CPM Team in order for the Mark WA Ready for Exec Review button to appear.

After clicking the button to transfer the Work Area to the Executive Team, the message below will appear.

Message

Ownership transferred successfully.

OK
Click **OK** to return to the CPM Team Work Area. The **Mark WA Ready For Exec Review** button will be replaced by **Transfer WA To CPM Team** button and **Mark WA Executive Review Complete** button. The only available option will be **View Details**, and the name in the **Owner** column changes to **Executive**.

The CPM Team then prints reports of the Work Area for review with the Executive Team.

**Executive Team Review**

If the Executive Team decides changes are still necessary to projects in the Work Area, the CPM Team may click the **Transfer WA To CPM Team** button to transfer the Work Area back to the CPM Team. The message below will appear. Click on the **OK** button to return to the Work Area.
The **Transfer WA To CPM Team** and **Mark Executive Review Complete** buttons will be replaced with the **Mark WA Ready for Exec Review**. The CPM Team may then make changes to the projects in the Work Area or send the Work Area back to an Asset Group for further review/editing. See Transferring the Work Area – CPM Team to Exec Review, Transferring the Work Area – CPM Team to Asset Team and Transferring the Work Area – Asset Team to CPM Team for additional details.

Once the Work Area has been transferred back to the Executive Team and the Executive Review is complete, the CPM Team member may click the **Mark WA Executive Review Complete** button.
Once the **Mark WA Executive Review Complete** button is clicked, the message below will appear. Click **OK** to return to the Work Area.

![Message]

Set Work Area as Executive review completed.

Upon returning to the Work Area, the only button visible will be the **Show/Hide Columns** button, the **AT Include Projects In Total** and **CPM Include Projects In Total** columns will not be editable for either the Asset Team or the CPM Team.
The Call Work Area is now complete, and on the Work Area Maintenance screen the **Exec Review Completed** column will change from No to Yes and the **Status** column will change from Active to Historical. The **Edit** icon will be removed, and the **Asset Groups** will only be able to see the **View Details** and **Edit** icons.
Work Area Maintenance Comments

After following the steps to access the Call Work Area, the Work Area Maintenance screen will open and users may enter comments into the comment field for each Des. In the Work Area Projects section, users may click on the N or Y to add and view comments.

Access to menu selections, icons, features and fields is dependent on a User’s role and security level. For details, refer to Understanding the Screen in the Getting Started section.

Instructions for common functions such as Viewing Details, Applying Filters, Sorting, Showing More Items per Page, and Exporting to Microsoft Excel may be found in the Getting Started section.

When the new comment window opens, the Header will display the Call Year of the selected Call Work Area, the View which indicates the role of the user viewing the Work Area Maintenance, the Asset Group of the Work Area Maintenance (empty for CPM Team), and the Owner of the Work Area at the current time (either the Asset Team, CPM Team or Executive).

The Work Area Comments section will display the Des number at the top, then three columns: Comment Type, Comment Text and Add New.

The Comment Type column lists the type of user who entered the comment, Asset Team, or CPM Team. The Comment Text column displays the text the indicated user added.

The Add New column allows for several actions. Click on the Add New icon to add a new comment. The ADD screen will appear under the comment table. Enter text into the comment field and click Save to save the comment, or click Cancel to return to the Work Area Comments section without adding a comment.
Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.

The message below will appear if Save is selected. Click OK to return to the Work Area Comments section.

**Message**

New item has been added successfully.

SPMS will not save the record or leave the ADD Screen Mode if a required field is left empty. Instead, a red asterisk (*) will appear to the right of the field and the cursor will blink inside the field.

Upon returning to the Work Area Comments, the comment will appear as a new comment. New comments are added to the top of the table.
Click on the View Details icon in the Add New column to view and print details about a specific comment. A window will appear that describes the Des #, Comment Type, Comment Text, Created By (name of user who created the comment), and Created On (the date the comment was created). Click on the Close Window icon to close the details window and return to the Comments main screen.

Once a Comment is created, it cannot be edited or deleted. When the user is finished reviewing/adding comments, click on the Back to Work Area button to return to the Work Area.

**Change Management**

Once a project has been approved by the Executive Team, any changes to the project should be made through the Change Management process.

To start the Change Management process for a Project, access the Project Maintenance Main Page by clicking on the Edit icon next to the Project’s Des # in the Des Basket or to the right of the Project in the Project Search - Search Results Panel.
Project Search - Search Results Panel

Access to menu selections, icons and features is dependent on a User's role and security level. For details, refer to Understanding the Screen in the Getting Started section.

Click on the Change Management icon or link in the General Maintenance section of the Project Maintenance Main Page or click on the Change Management icon below the Header on any Project Maintenance Panel.
From the **Change Management Document Panel**, the project's Change Management applications may be added or maintained.

**Adding An Application**

To add a Change Management application, click on the **Add New** icon to the right of the **Status Date** column heading.
The **Add New** icon will only appear when there are no other applications with a status of **New** or **In Process**.

A window will open prompting “Is this Des Managed by Central Office”. If the Des is managed by Central Office, click in the check box to indicate Yes and click the **Submit** button. If the Des is not managed by Central Office, leave the box unchecked and click the **Submit** button. Click the **Close** button to return to the Change Management Panel without adding a new application.

The new Change Management application should be visible in the list. The **Change Requested** and **Additional Change Requested** will be blank until the application is saved. Click on the **Edit** icon to open the application and begin the Change Management process.

Enter the required information as needed. See Change Management Application for more information on the application fields.
Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.

Click the Save button to save the new record or click on the Back button to return to the Change Management Panel without saving.

SPMS will not save the record if a required field is left empty. Instead, a red asterisk (*) will appear to the right of the required field. The cursor will blink inside text fields while dropdown fields will be highlighted.

After clicking Save, click on another icon in the Icon Bar to open a different Project Maintenance Panel or click Back to return to the Change Management Panel. When returning to the Change Management Panel the Change Requested (and Additional Change Requested if applicable) will be filled with the selections made during the application creation process.
Deleting An Application

To delete a Change Management Application, click on the Edit icon of the record you wish to delete. The Change Management application will open in a new window. Click on the Delete button at the top or bottom of the screen.

The Delete button will only appear when the Change Management application has a status of New. Once the status has progressed beyond New, an application may only be withdrawn. See Change Management Application for more information on how to withdraw an application.

The user must Save the application at least once before deleting the application. Clicking the Delete button without first saving the application will not result in the record being deleted.

A message will appear verifying the user wants to delete the application. Click the OK button to delete the application and return to the Change Management Panel or click the Cancel button to exit without deleting.

The removed application should no longer be visible in the Change Management list.
Click on another icon in the **Icon Bar** to open a different **Project Maintenance Panel**.

### Change Management List

Once a project has been approved by the Executive Team, any changes to projects should be made through the Change Management process. To access the Change Management List panel, select **Change Management** from the **Capital Budgeting** menu.

Access to menu selections, icons, features and fields is dependent on a User’s role and security level. For details, refer to **Understanding the Screen** in the Getting Started section.
The Change Management panel allows users to view a list of Change Management applications and edit Change Management applications. The Change Management panel displays new and in process applications, sorted by Des number. The project Des number, Contract number, Route, Location, Work Type and District are all pulled from the Des information in SPMS. The Status and Status Date columns display the status of the application and date that status was set.

Click the **Edit Change Management** icon located in the right most column to open and edit the application. See [Change Management Application](#) for more information on editing an application.
Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.

The ability to edit an application is controlled by where the application is in the approval process. If the application is at a step where the user is not able to edit the application, all fields will be grayed out and not editable.

Change Management Application

After following the steps as described in the Change Management, the selected Change Management application will display. Below the Icon Bar the following buttons will be available: Workflow, Save, Document List, Delete, Back. The Print Form icon will also be available.
Access to menu selections, icons, features and fields is dependent on a User’s role and security level. For details, refer to Understanding the Screen in the Getting Started section.

The Application Fields

The Change Management application has a variety of fields with information about the Des and several select fields for the user to edit. The information in the General Information fields at the top of the application is pre-populated from SPMS. Three fields are editable: Change Requested, Additional Change Requested (optional), and Funding Program. The application creator must fill out the Change Requested and Funding Program fields by selecting one of the options from each field’s dropdown menu. Once an application is transferred to the Capital Projects Fund Manager these fields are no longer editable.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.

The Project Financials section deals with the financial aspect of the Des. The Total PE/CE $ Spent to Date, Total RW $ Spent to Date, Total UT/RR $ Spent to Date and Total CN/RQP $ Spent to Date information is pulled from PeopleSoft and totals the amount spent from all the Des numbers associated with the contract (both Lead and Child Des numbers). These amounts include PO payments and Claim Voucher payments. The amounts are not editable.
The next section deals with Current and Proposed financial totals. On the Current side of the chart (on the left side of the page), financial totals are listed for the Current Fiscal Year (FY) and beyond. It does not display any previous FY information. Each FY and activity (PE/CE, RW, UT, RR and CN) has its own row. The activity totals are separated by the Development Phase (PE/RW/CE) and the Construction Phase (UT/RR/CN).

<table>
<thead>
<tr>
<th>Development Phase (PE/RW/CE)</th>
<th>FY</th>
<th>Program Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>PE/CE</td>
<td>PO Bal</td>
<td>$41,631.23</td>
</tr>
<tr>
<td>PE/CE</td>
<td>2012</td>
<td>$45,000.00</td>
</tr>
<tr>
<td>RW</td>
<td>2013</td>
<td>$275,000.00</td>
</tr>
<tr>
<td><strong>Total Development</strong></td>
<td></td>
<td><strong>$422,647.00</strong></td>
</tr>
</tbody>
</table>

\[Total\ \text{Development} = \text{Total of Development Phase} + \text{Total PE/CE $Spent to Date} + \text{Total RW $Spent to Date}\]

<table>
<thead>
<tr>
<th>Construction Phase (UT/RR/CN)</th>
<th>FY</th>
<th>Program Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>CN</td>
<td>2014</td>
<td>$2,642,707.00</td>
</tr>
<tr>
<td>UT/RR</td>
<td>2014</td>
<td>$55,000.00</td>
</tr>
<tr>
<td><strong>Total Construction</strong></td>
<td></td>
<td><strong>$2,697,707.00</strong></td>
</tr>
<tr>
<td><strong>Total Budget</strong></td>
<td></td>
<td><strong>$3,120,354.90</strong></td>
</tr>
</tbody>
</table>

\[Total\ \text{Construction} = \text{Total of Construction Phase} + \text{Total UT/RR $Spent to Date} + \text{Total CN/RRP $Spent}\]

The Development Phase and Construction Phase dollar amounts come from the SPMS Program Tab and are a total for all Des numbers associated with a contract. If PO’s exist, there will be a PO Bal. per Phase listed as first. The PO Bal. amount is calculated by pulling data from PeopleSoft, totaling PO’s by Phase and FY and subtracting PO payments.

Total Development and Total Construction dollar amounts are calculated by adding Spent to Date, PO Balances and Program Budget amounts.

The Proposed side of the chart (on the right side of the page) lists the same information pulled as the Current side of the chart, but it provides opportunities for the user to edit the information to show changes/impacts. Click in the Program Budget field to enter the proposed program budget for that activity in that FY. Click the Re-Calculate icon after entering text in the Program Budget field to update the Total Development/Construction and Program Impact columns.
To add a new line, click the **Add New** icon. Enter the required information as needed and click the **Add** button to add the item or **Cancel** to return to the application without adding the row.

After clicking the **Add** button, a new row will be added for both the Current and Proposed sides of the chart. The Current side will show the activity and FY, but the Program Budget amount will be 0.00; the Proposed side will display the user entered Proposed Program Budget and totals will update accordingly. User added rows are allowed to be deleted.

The **Project Delivery Schedule** pulls the **Current Letting** and **Current Score** directly from SPMS; the fields are not editable. The application creator fills out the **Proposed Letting**, **Current Project’s Intent**, **Proposed Score**, **Reason for Change** and **Proposed Strategy for Consideration**. Only the...
application’s creator (and the District CPM Director and Deputy Commissioner in the districts) may edit these fields. Once the application is transferred to the Capital Projects Fund Manager the fields are no longer editable.

The Additional Project’s Intent (CPFM), Additional Proposed Project’s Intent (CPFM), Additional Reason for Change (CPFM) and Additional Proposed Strategy for Construction (CPFM) fields are only editable by the Capital Projects Fund Manager, and only editable when he is the application owner in the Workflow.

No other Change Management application reviewers may edit the Change Management application form.

Save

Click the **Save** button to save the application. The Save button is only available when the user is able to edit the application; if the application is at a stage that does not allow for editing of information, the Save button will be grayed out and unavailable. An application may be saved as many times as necessary before transferring it to the next step in the approval process.

SPMS will not save the record if a required field is left empty. Instead, a red asterisk (*) will appear to the right of the required field. The cursor will blink inside text fields while dropdown fields will be highlighted.

Document List

Click the **Document List** button to view a list of supporting documents associated with the Change Management application.
The Document List does not contain the actual supporting documents, only information on what those documents are and where they may be found for additional viewing.

To add a new document, click on the Add New icon to the right of the Update By column. In the ADD Screen Mode, enter information as needed.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.

Click the Save button to save the new record and return to the Document List or click on the Cancel button to exit without saving.

SPMS will not save the record or leave the ADD Screen Mode if a required field is left empty. Instead, a red asterisk (*) will appear to the right of the field and the cursor will blink inside the field.

After clicking Save the user is returned to the Document List and the new item is visible in the list. Edit and Delete icons will be available at the end of the row. Click the Edit icon to edit the document. Update information as required and click Save to save the updated information or click Cancel to return to the Document List without saving changes.

Click Delete to delete the document from the document list. A message will appear verifying the user wants to delete the document. Click on the OK button to delete the document and return to the Document List or click on the Cancel button to exit without deleting. If deleting, the Document List will refresh with the selected document removed. Click the Close button to leave the Document List and return to the Change Management Application.
Workflow
Following business rules, the appropriate manager will click on the Workflow button to go to the workflow screen and progress the application through the application review process.

The user must **Save** the application at least once before clicking the **Workflow** button.

A dropdown list in the **Action** column will allow the user to make a selection from a list of appropriate options. The **Title** column is pre-populated with the current approver's title. The **Name** column provides a list of name or names of the current approver associated with the Title for that project’s location. The **Date** and **Entered By** columns will populate with the current date and user’s name that approved the step once the Workflow is saved.

Comments may be added or viewed by clicking on the **N** (default) or **Y** (if comments exist) in the **Comments** column. To add a comment, click the **N** in the **Comments** column. A window will open with a text field. Enter desired comments and click the **Add Comments** button to save comments and return to the Workflow screen, or click the **Close** button to return to the Workflow screen without saving comments.

Comments may be viewed and edited, but the **N** in the comments column will not change to a **Y** until the Workflow is saved. Once the Workflow is saved then comments from previous approvers may be viewed by clicking the **Y** in the Comments column, but cannot be edited.

When the user is ready to move the application approval process forward, they will select the desired option from the **Action** column and click the **Save Workflow** button. An email will be sent to the next approver in the process and a new row will be added to the Workflow panel with the next approver’s information.
The Change Management Application Status on the Change Management Panel changes from New to In Process once the District Deputy Commissioner approves district projects, or the Central Office Director approves Central Office projects.

The Change Management application status will change on the Change Management Panel from In Process to Withdrawn if the Capital Project Funds Manager selects Withdrawn at any point. The Save Workflow button will be grayed out at this point as well.

The Change Management application status will change on the Change Management Panel from In Process to Approved As-Is, Approved with Conditions, or Rejected based on the selection of the Executive Funds Team.

The Capital Projects Funds Manager may select Back to Business Owner any time the application is with him for approval. This sends the project back to the business owner and restarts the approval process.

The Capital Projects Funds Manager may skip certain approval steps by selecting the desired reviewer. Any skipped review steps will appear in the Workflow screen; the Date will be the date the reviewers were skipped, the Action column will display Not Applicable, the Name column will be empty and the Entered By column will display the name of the user who skipped the reviewers.

Any reviewer who selects Do Not Concur will require a Comment be added and result in the Change Management application being returned to the Capital Projects Fund Manager.

Click the Close Workflow button to return to the Change Management application.

Back

The Back button returns the user to the Change Management List. See Change Management List for more information.

Print Form

The Print Form icon allows users to print the Change Management application. The application prints all the fields on the application, as well as the information from the Workflow screen.
Any steps that were skipped in the review process will not display in the Print Form. See Workflow for more information on the review process.

Create a Project

An SPMS Project is a collection of information associated with a transportation-related construction effort. The first step in the lifecycle of a typical SPMS Project is to create the Project. In SPMS, this means creating a new Project record and entering the required information about the Project into the SPMS database.

To add/create a Project, select Create Project from the Projects menu.
Access to menu selections, icons, features and fields is dependent on a User’s role and security level. For details, refer to Understanding the Screen in the Getting Started section.

From the Create a Project screen, select either Create a Call Project or Create a Propose Project and click on Start to advance to the next screen where a Standalone, Lead or Sub Corporate Route or Special Route Project may be created by selecting the applicable radio buttons.

Click on the links below for help regarding a specific Project Type. Note: While in the middle of creating a Project, only the Help related to that Project type is available via the Help icon.

- Create a Standalone or Lead Corporate Route Project
- Create a Standalone or Lead Special Route Project
- Create a Sub Corporate Route Project
- Create a Sub Special Route Project

Project Drafts

When creating a Project, work is saved whenever the Next button is clicked on a screen or when the Save Draft link located at the top of each screen is clicked. This allows the User to continue work at a later time.

Anytime there is a saved draft, the Create a Project screen displays a reminder. The Click here link may be used to resume work. If the Start button is clicked to begin a new Project, the Draft is deleted.
Create a Standalone or Lead Corporate Route Project

An SPMS Project is a collection of information associated with a transportation-related construction effort. The first step in the lifecycle of a typical SPMS project is to create the project. In SPMS, this means creating a new Project record and entering the required information about the Project into the SPMS database.

To add/create a Project, select **Create Project** from the **Projects** menu.

Access to menu selections, icons, features and fields is dependent on a User’s role and security level. For details, refer to **Understanding the Screen** in the Getting Started section.

From the Create a Project screen, select either **Create a Call Project** or **Create a Propose Project** and click on **Start** to advance to the next screen where a **Standalone**, **Lead** or **Sub Corporate Route** or **Special Route** Project may be created by selecting the applicable radio buttons.
Create a project panel headings are labeled Propose or Call based on the selection made in the previous screen. For the purpose of this document, a mixture of Propose and Call screenshots are used.

To create a **new Standalone or Lead Corporate Route** Project, click in the **Standalone or Lead Project** and **Corporate Route** radio buttons to select them. Then, click on the **Next** button.

### Route Selection Panel

In the **Route Selection Panel**, enter road and reference post information and click on the **Next** button. The values in the **Route Type** dropdown list are limited to Corporate route types. The values in the **Route #** dropdown list are automatically updated once a **Route Type** is selected.

Field values that are grayed out are auto-populated, and therefore **NON-EDITABLE**. Fields with a peach background are **REQUIRED**. Fields with no background color are **OPTIONAL**.

To pick from a list of available reference posts, select the Route then click on the **search tool** icon. In the **Reference Posts List**, shown below, select from a list of reference posts assigned to the route.
If the reference post information entered is not valid for the route, the error message shown below displays. The data must be corrected to continue and advance beyond the Route Selection Panel. If route and reference post information was entered correctly, an SPMS Administrator must be notified to correct the problem. Click on the Email SPMS Support icon in the title bar for assistance.

If the Corporate route reference post information crosses more than one district, an error message displays as shown below. The data must be corrected to continue and advance beyond the Route Selection Panel.

If the Service that retrieves route data is unavailable, the error message displays as shown below. If this message is received, please open an IOT Help Desk ticket.
To open an IOT Helpdesk ticket, click on the **Helpdesk Assistant** icon and report the problem as shown in the screen below.

SPMS will not advance to the next screen if a required field is left empty. A red asterisk (*) will appear to the right of the field. The cursor will blink inside text fields while dropdown fields will be highlighted.
Route Details Panel

Available data from the official source databases are imported and displayed on the Route Details Panel based on the route and reference post information entered.

Some fields are populated from data mapping between the Source and SPMS systems. If the information maps correctly for these fields, a green checkmark ✓ appears next to the field, and the Source and SPMS values display in side-by-side-columns.

Other fields are populated from calculations based on the route and reference post information entered on the Route Selection Panel. If values could be determined, a green checkmark ✓ appears next to each field.

Information on this Panel is editable ONLY for SPMS Administrators. Therefore, it is CRITICAL to check every field for accuracy as it cannot be edited even when maintaining the Project.

A red triangle ▲ appears next to any field that needs attention. It is possible that the road and reference post information was entered incorrectly. If so, click on the Previous button to return to the Route Selection Panel and correct any data entry errors.

However, if the errors indicated with a red triangle ▲ are due to data not mapping correctly or data not found, an SPMS Administrator must be notified to correct the problem. Click on the Email SPMS Support icon in the title bar for assistance.
Until all required fields are reflected correctly (indicated by the green checkmark ✔️), no further work may be done on creating this project. The Next button is disabled and there is no Save Draft link at the top of the Panel. Click on the Previous button to enter route and reference post information again or discard this Draft by clicking the Cancel button or navigating to another menu option. A Draft of the Project will not be saved.
When all information on this Panel is complete and accurate, click the **Next** button to continue.

**General Information Panel**

In the **General Information Panel**, select the **Designed By** location, **Work Category**, **Work Type**, and **Sponsor** from their dropdown lists. The values in the **Designed By** dropdown list are the localities in which the User has authority to create a Project. This is based on the User’s security profile.

It is important to select a **Designed By** value first as the **Work Category and Work Type** dropdown lists are populated with valid choices based on this information.

**Location** information is limited to 80 characters and should be specific and not repeat information existing in other fields. For example, the road number and city are already provided and should not be mentioned in the **Location**. Examples of acceptable **Location** entries are:

<table>
<thead>
<tr>
<th>Location Type</th>
<th>Location Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Road</td>
<td>FROM 1.40 miles W of SR5 TO 2.50 miles W of SR5</td>
</tr>
<tr>
<td>Bridge</td>
<td>Bridge OVER No Named Creek, 1.35 miles N of SR14</td>
</tr>
<tr>
<td>Single Point</td>
<td>AT Main Street in <strong>TOWN</strong></td>
</tr>
<tr>
<td>Small Structure</td>
<td>OVER Tippy Ditch, 3.5 miles S of SR124</td>
</tr>
</tbody>
</table>

**Program Year** and **Asset Group** are required fields for a Call project and optional for a Proposed project. Complete optional fields as needed.

Field values that are grayed out are auto-populated, and therefore **NON-EDITABLE**. Fields with a peach background are **REQUIRED**. Fields with no background color are **OPTIONAL**.
### General Information Panel

- **Contract Prefix:** 
- **Planning Area:** IMPD
- **Designed By:** 
- **Work Category:** 
- **Work Type:** 
- **Functional Class:** Urban Interstate
- **Program Class:** 
- **Group Category:** 
- **Transportation System:** Interstate
- **Sponsor:** 
- **City Boundary:** Evansville
- **FMIS Urban Areas:** Evansville (KY)
- **FMIS Area:** 260,000
- **FHWA Oversight:** 

### Status
- **Project Type:** Call
- **Design Standard:** 
- **Small Struct Ubl:** 
- **Status:** 
- **Call Project:** 02/01/2011
- **Proposed:** 
- **Authorized:** 
- **General Maint:** 

### Project Dates
- **Detour Required:** 
- **Relinquishment Roy:** 
- **Signs Required:** 
- **Wetland Indicator:** 
- **Emergency Project:** 
- **Significant Proj. Del.:** 
- **FTA:** 
- **Lighting Required:** 
- **Design Units:** 

### Coordinates
- **Start Latitude:** 
- **Start Longitude:** 
- **Mid Latitude:** 
- **Mid Longitude:** 
- **End Latitude:** 
- **End Longitude:** 

### Capitalization
- **GASB-34 Capitalization:** 
- **Construction and Engineering:** 
- **Special Fund Category:** 

### Lead Acquisition
- **Lead Project:** 
- **Alternate Bid:** 

### Designers
- **LA:** 
- **DS:** 
- **TR:** 
- **EA:** 
- **PD:**

---

[Diagram of the General Information Panel]
SPMS will not advance to the next screen if a required field is left empty. A red asterisk (*) will appear to the right of the field. The cursor will blink inside text fields while dropdown fields will be highlighted.

When finished, click on the **Next** button to continue or click on the **Previous** button to return to the prior screen.

**Call Application Panel**

The **Call Application** panel will only display if Create a Call Project was selected. In the **Call Application** Panel, enter information as needed.

Field values that are grayed out are auto-populated, and therefore **NON-EDITABLE**. Fields with a peach background are **REQUIRED**. Fields with no background color are **OPTIONAL**.
When finished, click on the **Next** button to continue or click on the **Previous** button to return to the prior screen.

**Estimates Panel**

In the **Estimates Panel**, enter dollars in the **Amount** column as needed.

Field values that are grayed out are auto-populated, and therefore **NON-EDITABLE**. Fields with a peach background are **REQUIRED**. Fields with no background color are **OPTIONAL**.
When finished, click on the **Next** button to continue or click on the **Previous** button to return to the prior screen.

If no Estimate dollars are entered, an error message displays requiring that an amount greater than zero be entered for at least one Phase before going to the next screen. Click on the **OK** button and correct the information before clicking on the **Next** button again.

**Message**

Total Estimate amount must be greater than zero(0).

**Districts and Congressional Districts Panels**

Information in the **Districts and Congressional Districts Panels** is non-editable for Corporate Route Projects. It is displayed for information only.
### Propose A Project - Districts Panel

#### Districts

<table>
<thead>
<tr>
<th>Select</th>
<th>District ID</th>
<th>District Code</th>
<th>District Sub Code</th>
<th>District #</th>
<th>Sub District Name</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>450</td>
<td>V0</td>
<td>V3</td>
<td>663</td>
<td>Evansville Sub</td>
</tr>
<tr>
<td></td>
<td>430</td>
<td>V0</td>
<td>V1</td>
<td>661</td>
<td>Linton Sub</td>
</tr>
<tr>
<td></td>
<td>440</td>
<td>V0</td>
<td>V2</td>
<td>662</td>
<td>Dale Sub</td>
</tr>
<tr>
<td></td>
<td>400</td>
<td>V0</td>
<td>V4</td>
<td>664</td>
<td>Paoli Sub</td>
</tr>
<tr>
<td></td>
<td>470</td>
<td>V0</td>
<td>V5</td>
<td>665</td>
<td>Branchville Sub</td>
</tr>
<tr>
<td></td>
<td>480</td>
<td>V0</td>
<td>V6</td>
<td>666</td>
<td>Vincennes Sub</td>
</tr>
<tr>
<td></td>
<td>490</td>
<td>V0</td>
<td>V9</td>
<td>999</td>
<td>Vincennes Multiple Sub</td>
</tr>
<tr>
<td></td>
<td>515</td>
<td>V0</td>
<td>V7</td>
<td>667</td>
<td>Tell City Sub</td>
</tr>
</tbody>
</table>
When finished, click on the **Next** button to continue or click on the **Previous** button to return to the prior screen.

### Route and Reference Panel

Information on the **Route and Reference Panel** is non-editable for Corporate Route Projects. It is displayed for information only.
When finished, click on the **Next** button to continue or click on the **Previous** button to return to the prior screen.

**Project Length Panel**

Information on the **Project Length Panel** is non-editable for Corporate Route Projects. It is automatically calculated from the Project’s reference post information and displayed for information only.

Field values that are grayed out are auto-populated, and therefore **NON-EDITABLE**. Fields with a peach background are **REQUIRED**. Fields with no background color are **OPTIONAL**.
When finished, click on the **Next** button to continue or click on the **Previous** button to return to the prior screen.

When all project information is complete and verified, SPMS assigns a Designation Number, adds the Project to the database with a status of “Call” or “Proposed” based on the selection made at the start of creating the project and Project Proposed Date or Project Call Date is equal to the date the Des # is assigned. A message displays to confirm the Project’s successful addition to the database. Click on the **OK** button to return to the Create a Project initial screen and continue working in SPMS.

![Message](image)

New project has been created successfully. Des # 1005660

---

**Saving a Draft of a Project**

A **Save a Draft** link is provided at the top of each screen while proposing a Project allowing the User to save the Project being created so work may be continued at a later time. A Draft is saved when the **Next**
button is clicked or when the **Save a Draft** link is clicked. SPMS saves your work but does not navigate away from the current screen. Advance by clicking on the **Next** button when ready.

The next time the Create a Project screen is accessed, a reminder displays that there is pending call or proposal work. Click on the **Click here** link to resume work. It is important to know that once the **Start** button is clicked to begin a new Project, the Draft is deleted.

---

**Create a Standalone or Lead Special Route Project**

An SPMS **Project** is a collection of information associated with a transportation-related construction effort. The first step in the lifecycle of a typical SPMS project is to create the project. In SPMS, this means creating a new Project record and entering the required information about the Project into the SPMS database.

To add/create a Project, select **Create Project** from the **Projects** menu.

---

Access to menu selections, icons, features and fields is dependent on a User’s role and security level. For details, refer to **Understanding the Screen** in the Getting Started section.
From the Create a Project screen, select either Create a Call Project or Create a Propose Project and click on Start to advance to the next screen where a **Standalone, Lead or Sub Corporate Route** or **Special Route** Project may be created by selecting the applicable radio buttons.

Create a project panel headings are labeled Propose or Call based on the selection made in the previous screen. For the purpose of this document, a mixture of Propose and Call screenshots are used.

To create a **new Standalone or Lead Special Route** Project, click in the Standalone or Lead Project and Special Route radio buttons to select them. Then, click on the **Next** button.

**General Information Panel**

In the **General Information Panel**, select the Designed By location, Work Category, Work Type, Functional Class, Transportation System, Sponsor, FMIS Urban Area and FMIS Area from their dropdown lists. The values in the Designed By dropdown list are the localities in which the User has authority to create a Project. This is based on the User’s security profile.

It is important to select a Designed By value first as the Work Category and Work Type dropdown lists are populated with valid choices based on this information.

**Program Year** and **Asset Group** are required fields for a Call Project and option for a Proposed Project.

**Location** information is limited to 80 characters and should be specific and not repeat information existing in other fields. For example, the road number and city are already provided and should not be mentioned in the Location. Examples of acceptable Location entries are:
<table>
<thead>
<tr>
<th>Location Type</th>
<th>Location Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Road</td>
<td>FROM 1.40 miles W of SR5 TO 2.50 miles W of SR5</td>
</tr>
<tr>
<td>Bridge</td>
<td>Bridge OVER No Named Creek, 1.35 miles N of SR14</td>
</tr>
<tr>
<td>Single Point</td>
<td>AT Main Street in TOWN</td>
</tr>
<tr>
<td>Small Structure</td>
<td>OVER Tippy Ditch, 3.5 miles S of SR124</td>
</tr>
</tbody>
</table>

Complete optional fields as needed.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.
SPMS will not advance to the next screen if a required field is left empty. A red asterisk (*) will appear to the right of the field. The cursor will blink inside text fields while dropdown fields will be highlighted.

When finished, click on the Next button to continue or click on the Previous button to return to the prior screen.

**Call Application Panel**

The Call Application panel will only display if Create a Call Project was selected. In the Call Application Panel, enter information as needed.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.
When finished, click on the **Next** button to continue or click on the **Previous** button to return to the prior screen.

**Estimates Panel**

In the **Estimates** tab, enter dollars in the **Amount** column as needed.

Field values that are grayed out are auto-populated, and therefore **NON-EDITABLE**. Fields with a peach background are **REQUIRED**. Fields with no background color are **OPTIONAL**.
When finished, click on the **Next** button to continue or click on the **Previous** button to return to the prior screen.

If no Estimate dollars are entered, an error message displays requiring that an amount greater than zero be entered for at least one Phase before going to the next screen. Click on the **OK** button and correct the information before clicking on the **Next** button again.

**Districts Panel**

Select the **Primary District** from the dropdown list.
The sub-districts auto-populate based on the Primary District. Place a checkmark in the checkbox next to the sub-districts associated with the Project.

<table>
<thead>
<tr>
<th>Select</th>
<th>District ID</th>
<th>District Code</th>
<th>District Sub Code</th>
<th>District Name</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>20</td>
<td>C0</td>
<td>C1</td>
<td>611 Terre Haute Sub</td>
</tr>
<tr>
<td></td>
<td>30</td>
<td>C0</td>
<td>C2</td>
<td>612 Crawfordsville Sub</td>
</tr>
<tr>
<td></td>
<td>40</td>
<td>C0</td>
<td>C3</td>
<td>613 Fowler Sub</td>
</tr>
<tr>
<td></td>
<td>50</td>
<td>C0</td>
<td>C4</td>
<td>614 Frankfort Sub</td>
</tr>
<tr>
<td></td>
<td>60</td>
<td>C0</td>
<td>C5</td>
<td>615 Cloverdale Sub</td>
</tr>
<tr>
<td></td>
<td>70</td>
<td>C0</td>
<td>C6</td>
<td>616 Veedersburg Sub</td>
</tr>
<tr>
<td></td>
<td>80</td>
<td>C0</td>
<td>C9</td>
<td>999 Crawfordsville Multiple Sub</td>
</tr>
</tbody>
</table>
When finished, click on the **Next** button to continue or click the **Previous** button to return to the prior screen.

A Primary District must be added to the Project. An error message displays requiring that one be selected before going to the next screen.

Click the **OK** button and add the District information before clicking the **Next** button again.

**Congressional Districts Panel**

Place a checkmark ✓ in the checkbox □ next to the Congressional Districts associated with the Project. (The Project may involve more than one Congressional District.)
When finished, click on the **Next** button to continue or click on the **Previous** button to return to the prior screen.

A Congressional District must be selected for the Project. An error message displays requiring that one be selected before going to the next screen.

Click the **OK** button and add the District information before clicking the **Next** button again.

### Route and Reference Panel
The Route and Reference Panel has a Route and a Reference section. Click on the Add Route button to add a route to the Project.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.

The Add Route Panel contains two tabs, one to be used to add a route that already exists and one to be used to create a new route and select it for this Project.

1) Select Existing Route

Click on the Select Existing Route tab heading. Select the Route Type and/or County from the dropdown list to return all existing routes of that type within the counties involved in the Project. Click on the green checkmark ✓ to select the desired route from the list.

To filter the list, type the name of the route (or any part of the name) into the Route Name text box and click on the Apply Filter icon.
SPMS populates the route information on the main Route and Reference Panel. The Add Route button is replaced with a Remove Route button, which may be used to clear the values from the screen, remove the added route from the Project and display the Add Route button again to add a new route.

2) Add and Select New Route

Click on the Add and Select New Route tab heading. In the Add Screen Mode, select the Route Type and County from the dropdown lists. The values in each list come from the Special Route List. When a new Route is added, it is added to the Special Route List. The Route Number is automatically generated for County Roads and City Streets. For Various Route Types, a Route Number of VARI is automatically generated.
Click on the **Add** button to save the route. SPMS populates the route information with an auto-generated route number on the main **Route and Reference Panel**. The **Add Route** button is replaced with a **Remove Route** button, which can be used to clear the values from the screen, remove the added route and display the **Add Route** button again to add a new route.

Update the Number of Lanes, Reference Post and Traffic information as needed.

When finished, click on the **Next** button to continue or click on the **Previous** button to return to the prior screen.

A Route must be added to the Project. An error message displays requiring that one be added before going to the next screen.
Click the **OK** button and add the Route and Reference information before clicking the **Next** button again.

### Project Length Panel

The Project Length Panel displays the length for each County affected by the Project in miles and kilometers. Lengths may be added, edited, or deleted. It is important to know that no **Delete** icon appears next to the County that the Project starts in, because that information cannot be deleted. In the example below, the Project begins in Adams County, which cannot be deleted as a Delete icon does not appear.

<table>
<thead>
<tr>
<th>County Code</th>
<th>County Name</th>
<th>Kilometers</th>
<th>Miles</th>
</tr>
</thead>
<tbody>
<tr>
<td>27</td>
<td>Grant</td>
<td>0.000</td>
<td>0.000</td>
</tr>
<tr>
<td>5</td>
<td>Blackford</td>
<td>234.000</td>
<td>146.250</td>
</tr>
</tbody>
</table>

Field values that are grayed out are auto-populated, and therefore **NON-EDITABLE**. Fields with a peach background are **REQUIRED**. Fields with no background color are **OPTIONAL**.

In the **Project Length Panel**, click the **Add New** icon to the right of the **Miles** column heading to add a **Length**.
In the **ADD Screen Mode**, select the **County** from the dropdown list and enter the kilometers or miles in the text box. If the fields are left blank, SPMS fills the fields with zeroes (0). If one unit of measurement is entered, the other is calculated by SPMS. For example, type the number of miles into the **Miles** text box and hit the Tab key to move the cursor from the field. The number of kilometers appears in the **Kilometers** text box.

Dropdown fields have an auto-complete feature. For example, click on the County dropdown arrow to the right of the field for a complete list of available Counties. Typing a letter in the dropdown field navigates to the first value in the list that begins with that letter. For example, typing a “P” displays “Perry”.
Click on the **Add** button to save the new record and return to the **Project Length Panel** or click on the **Cancel** button to exit without saving. Once saved, the new Project Length should be visible in the List.

SPMS will not save the record or leave the **ADD Screen Mode** if the required fields are empty. Instead, a red asterisk (*) will appear to the right of the field and the cursor will blink inside the field.

Once a **Project Length** is added to the List, it can be edited or deleted.

To edit a Project Length, click on the **Edit** icon next to the record to be updated.
Instructions for common functions such as Viewing Details, Applying Filters, Sorting, Showing More Items per Page, and Exporting to Microsoft Excel may be found in the Getting Started section.

In the EDIT Screen Mode, update the miles and kilometers fields as needed. If the fields are left blank, SPMS fills the fields with zeroes (0). The County may not be edited.

Click on the Cancel button to exit without saving or click on the Update button to save the record and return to the Project Length Panel.

To delete a Project Length, click on the Delete icon next to the record to be removed. It is important to know that no Delete icon appears next to the County that the Project starts in, because that information cannot be deleted.

A confirmation message displays. Click on the OK button to confirm the deletion or click on the Cancel button to exit without saving any changes.
The Project Length is removed from the list.

When finished, click on the Finish button to continue or click on the Previous button to return to the prior screen.

When all project information is complete and verified, SPMS assigns a Designation Number, adds the Project to the database with a status of “Call” or “Proposed” based on the selection made at the start of creating the project and Project Proposed Date or Project Call Date is equal to the date the Des # is assigned. A message displays to confirm the Project’s successful addition to the database. Click on the OK button to return to the Create a Project initial screen and continue working in SPMS.

Saving a Draft of a Project

A Save a Draft link is provided at the top of each screen while proposing a Project allowing the User to save the Project being created so work may be continued at a later time. A Draft is saved when the Next button is clicked or when the Save a Draft link is clicked. SPMS saves your work but does not navigate away from the current screen. Advance by clicking on the Next button when ready.

The next time the Create a Project screen is accessed, a reminder displays that there is pending call or proposal work. Click on the Click here link to resume work. It is important to know that once the Start button is clicked to begin a new Project, the Draft is deleted.
Create A Project

There is Call / Proposal work pending. Click here to resume using the draft you previously saved.
(Note: Previously saved draft will be deleted if you click on “Start” below.)

To create a Call / Proposal Stand Alone, Lead or Sub Project from the beginning, select the options below and click Start.

- Create a Call Project
- Create a Propose Project

Start
Create a Sub Corporate Route Project

An SPMS Project is a collection of information associated with a transportation-related construction effort. The first step in the lifecycle of a typical SPMS project is to create the project. In SPMS, this means creating a new Project record and entering the required information about the Project into the SPMS database.

To add/create a Project, select Create Project from the Projects menu.

Access to menu selections, icons, features and fields is dependent on a User’s role and security level. For details, refer to Understanding the Screen in the Getting Started section.

Creating a Sub Corporate Route Project

From the Create a Project screen, select either Create a Call Project or Create a Propose Project and click on Start to advance to the next screen where a Standalone, Lead or Sub Corporate Route or Special Route Project may be created by selecting the applicable radio buttons.
Create a project panel headings are labeled Propose or Call based on the selection made in the previous screen. For the purpose of this document, a mixture of Propose and Call screenshots are used.

A **Standalone or Lead Project** may require subsets of work to manage the Project schedule more efficiently. For these Projects, **Sub-Projects** are added as children to the parent Lead Project.

Sub-Projects are created just as Standalone/Lead Projects but are connected to the Lead Project by identifying the “Origin” Project # on the initial screen. The Origin Project’s status must be **Active** or **Provisional** before a Sub-Project can be created for it.

To create a **new Sub Corporate Route** Project, click in the **Sub Project** and **Corporate Route** radio buttons to select them. Enter the Origin Project # in the text box. Then, click on the **Next** button.

**Route Selection Panel**

In the **Route Selection Panel**, enter road and reference post information and click on the **Next** button. The values in the **Route Type** dropdown list are limited to Corporate route types. The values in the **Route #** dropdown list are automatically updated once a **Route Type** is selected.

Field values that are grayed out are auto-populated, and therefore **NON-EDITABLE**. Fields with a peach background are **REQUIRED**. Fields with no background color are **OPTIONAL**.
To pick from a list of available reference posts, select the Route then click on the search tool icon. In the Reference Posts List, shown below, select from a list of reference posts assigned to the route.

If the reference post information entered is not valid for the route, the error message shown below displays. The data must be corrected to continue and advance beyond the Routes Panel. If route and reference post information was entered correctly, an SPMS Administrator must be notified to correct the problem. Click on the Email SPMS Support icon in the title bar for assistance.
If the Corporate route reference post information crosses more than one district, an error message displays as shown below. The data must be corrected to continue and advance beyond the Route Selection Panel.

If the Service that retrieves route data is unavailable, the error message displays as shown below. If this message is received, please open an IOT Help Desk ticket.

To open an IOT Helpdesk ticket, click on the Helpdesk Assistant icon and report the problem as shown in the screen below.
SPMS will not advance to the next screen if a required field is left empty. A red asterisk (*) will appear to the right of the field. The cursor will blink inside text fields while dropdown fields will be highlighted.

When finished, click on the Next button to continue or click on the Previous button to return to the prior screen.

Work is saved when the Next button is clicked on each screen. At any point, work may be saved by clicking on the Save a Draft link at the top of each screen. For details, refer to the Saving a Draft of the Project section.

**Route Details Panel**

Available data from the official source databases are imported and displayed on the Route Details Panel based on the route and reference post information entered.
Some fields are populated from data mapping between the Source and SPMS systems. If the information maps correctly for these fields, a green checkmark ✓ appears next to the field, and the Source and SPMS values display in side-by-side-columns.

Other fields are populated from calculations based on the route and reference post information entered on the Route Selection Panel. If values could be determined, a green checkmark ✓ appears next to each field.

Information on this Panel is editable ONLY for SPMS Administrators. Therefore, it is CRITICAL to check every field for accuracy as it cannot be edited even when maintaining the Project.

A red triangle ▶ appears next to any field that needs attention. It is possible that the road and reference post information was entered incorrectly. If so, click on the Previous button to return to the Route Selection Panel and correct any data entry errors.

However, if the errors indicated with a red triangle ▶ are due to data not mapping correctly or data not found, an SPMS Administrator must be notified to correct the problem. Click on the Email SPMS Support icon in the title bar for assistance.
Until all required fields are reflected correctly (indicated by the green checkmark ✓), no further work may be done on creating this project. The Next button is disabled and there is no Save Draft link at the top of the Panel. Click on the Previous button to enter route and reference post information again or discard this Project Proposal by clicking the Cancel button or navigating to another menu option. A Draft of the Project will not be saved.

When all information on this Panel is complete and accurate, click the Next button to continue.

**General Information Panel**

In the General Information Panel, select the Designed By location, Work Category, Work Type, and Sponsor from their dropdown lists. The values in the Designed By dropdown list are the localities in which the User has authority to create a Project. This is based on the User’s security profile.

It is important to select a Designed By value first as the Work Category and Work Type dropdown lists are populated with valid choices based on this information.

Program Year and Asset Group are required fields for a Call Project and option for a Proposed Project.

Location information is limited to 80 characters and should be specific and not repeat information existing in other fields. For example, the road number and city are already provided and should not be mentioned in the Location. Examples of acceptable Location entries are:

<table>
<thead>
<tr>
<th>Location Type</th>
<th>Location Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Road</td>
<td>FROM 1.40 miles W of SR5 TO 2.50 miles W of SR5</td>
</tr>
<tr>
<td>Bridge</td>
<td>Bridge OVER No Named Creek, 1.35 miles N of SR14</td>
</tr>
<tr>
<td>Location Type</td>
<td>Location Description</td>
</tr>
<tr>
<td>--------------------</td>
<td>------------------------------------</td>
</tr>
<tr>
<td>Single Point</td>
<td>AT Main Street in TOWN</td>
</tr>
<tr>
<td>Small Structure</td>
<td>OVER Tippy Ditch, 3.5 miles S of SR124</td>
</tr>
</tbody>
</table>

Complete optional fields as needed.

Field values that are grayed out are auto-populated, and therefore **NON-EDITABLE**. Fields with a peach background are **REQUIRED**. Fields with no background color are **OPTIONAL**.

![Create A Call Project - General Information Panel](image-url)
SPMS will not advance to the next screen if a required field is left empty. A red asterisk (*) will appear to the right of the field. The cursor will blink inside text fields while dropdown fields will be highlighted.

When finished, click on the **Next** button to continue or click on the **Previous** button to return to the prior screen.

**Call Application Panel**

The **Call Application** panel will only display if Create a Call Project was selected. In the **Call Application Panel**, enter information as needed.

Field values that are grayed out are auto-populated, and therefore **NON-EDITABLE**. Fields with a peach background are **REQUIRED**. Fields with no background color are **OPTIONAL**.
When finished, click on the **Next** button to continue or click on the **Previous** button to return to the prior screen.

### Estimates Panel

In the **Estimates Panel**, enter dollars in the **Amount** column as needed.

Field values that are grayed out are auto-populated, and therefore **NON-EDITABLE**. Fields with a peach background are **REQUIRED**. Fields with no background color are **OPTIONAL**.
When finished, click on the **Next** button to continue or click on the **Previous** button to return to the prior screen.

If no Estimate dollars are entered, an error message displays requiring that an amount greater than zero be entered for at least one Phase before going to the next screen. Click on the **OK** button and correct the information before clicking on the **Next** button again.

**Districts and Congressional Districts Panels**

Information in the **Districts and Congressional Districts Panels** is non-editable for Corporate Route Projects. It is displayed for information only.
### Propose A Project - Districts Panel

<table>
<thead>
<tr>
<th>Select</th>
<th>District ID</th>
<th>District Code</th>
<th>District Sub Code</th>
<th>District #</th>
<th>Sub District Name</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>450</td>
<td>V0</td>
<td>V3</td>
<td>663</td>
<td>Evansville Sub</td>
</tr>
<tr>
<td></td>
<td>430</td>
<td>V0</td>
<td>V1</td>
<td>661</td>
<td>Linton Sub</td>
</tr>
<tr>
<td></td>
<td>440</td>
<td>V0</td>
<td>V2</td>
<td>662</td>
<td>Dale Sub</td>
</tr>
<tr>
<td></td>
<td>400</td>
<td>V0</td>
<td>V4</td>
<td>664</td>
<td>Paoli Sub</td>
</tr>
<tr>
<td></td>
<td>470</td>
<td>V0</td>
<td>V5</td>
<td>665</td>
<td>Branchville Sub</td>
</tr>
<tr>
<td></td>
<td>480</td>
<td>V0</td>
<td>V6</td>
<td>666</td>
<td>Vincennes Sub</td>
</tr>
<tr>
<td></td>
<td>490</td>
<td>V0</td>
<td>V9</td>
<td>999</td>
<td>Vincennes Multiple Sub</td>
</tr>
<tr>
<td></td>
<td>515</td>
<td>V0</td>
<td>V7</td>
<td>667</td>
<td>Tell City Sub</td>
</tr>
</tbody>
</table>
When finished, click on the **Next** button to continue or click on the **Previous** button to return to the prior screen.

**Route and Reference Panel**

Information in the **Route and Reference Panel** is non-editable for Corporate Route Projects. It is displayed for information only.
When finished, click on the **Next** button to continue or click on the **Previous** button to return to the prior screen.

**Project Length Panel**

Information in the **Project Length Panel** is non-editable for Corporate Route Projects. It is displayed for information only.
When finished, click on the Next button to continue or click on the Previous button to return to the prior screen.

When all project information is complete and verified, SPMS assigns a Designation Number, adds the Project to the database with a status of “Call” or “Proposed” based on the selection made at the start of creating the project and Project Proposed Date or Project Call Date is equal to the date the Des # is assigned. A message displays to confirm the Project’s successful addition to the database. Click on the OK button to return to the Create a Project initial screen and continue working in SPMS.

**Saving a Draft of a Project**

A Save a Draft link is provided at the top of each screen while proposing a Project allowing the User to save the Project being created so work may be continued at a later time. A Draft is saved when the Next
button is clicked or when the **Save a Draft** link is clicked. SPMS saves your work but does not navigate away from the current screen. Advance by clicking on the **Next** button when ready.

The next time the Create a Project screen is accessed, a reminder displays that there is pending call or proposal work. Click on the **Click here** link to resume work. It is important to know that once the **Start** button is clicked to begin a new Project, the Draft is deleted.
Create a Sub Special Route Project

An SPMS Project is a collection of information associated with a transportation-related construction effort. The first step in the lifecycle of a typical SPMS project is to create the project. In SPMS, this means creating a new Project record and entering the required information about the Project into the SPMS database.

To add/create a Project, select Create Project from the Projects menu.

Access to menu selections, icons, features and fields is dependent on a User's role and security level. For details, refer to Understanding the Screen in the Getting Started section.

Creating a Sub Special Route Project

From the Create a Project screen, select either Create a Call Project or Create a Propose Project and click on Start to advance to the next screen where a Standalone, Lead or Sub Corporate Route or Special Route Project may be created by selecting the applicable radio buttons.
Create a project panel headings are labeled Propose or Call based on the selection made in the previous screen. For the purpose of this document, a mixture of Propose and Call screenshots are used.

A Standalone or Lead Project may require subsets of work to manage the Project schedule more efficiently. For these Projects, Sub-Projects are added as children to the parent Lead Project.

Sub-Projects are created just as Standalone/Lead Projects but are connected to the Lead Project by identifying the “Origin” Project # on the initial screen. The Origin Project’s status must be Active or Provisional before a Sub-Project can be created for it.

To create a new Sub Special Route Project, click in the Sub Project and Special Route radio buttons to select them. Enter the Origin Project # in the text box. Then, click on the Next button.

**General Information Panel**

In the General Information Panel, some fields are pre-populated from the Origin Project information. Select the Designed By location, Work Category, Work Type, and Sponsor from their dropdown lists. The values in the Designed By dropdown list are the localities in which the User has authority to create a Project. This is based on the User’s security profile.

It is important to select a Designed By value first as the Work Category and Work Type dropdown lists are populated with valid choices based on this information.

Program Year and Asset Group are required fields for a Call Project and option for a Proposed Project

Location information is limited to 80 characters and should be specific and not repeat information existing in other fields. For example, the road number and city are already provided and should not be mentioned in the Location. Examples of acceptable Location entries are:

<table>
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<tr>
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<td>Bridge OVER No Named Creek, 1.35 miles N of SR14</td>
</tr>
<tr>
<td>Location Type</td>
<td>Location Description</td>
</tr>
<tr>
<td>--------------------</td>
<td>-------------------------------------</td>
</tr>
<tr>
<td>Single Point</td>
<td>AT Main Street in TOWN</td>
</tr>
<tr>
<td>Small Structure</td>
<td>OVER Tippy Ditch, 3.5 miles S of SR124</td>
</tr>
</tbody>
</table>

Complete optional fields as needed.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.
SPMS will not advance to the next screen if a required field is left empty. A red asterisk (⋆) will appear to the right of the field. The cursor will blink inside text fields while dropdown fields will be highlighted.

When finished, click on the **Next** button to continue or click on the **Previous** button to return to the prior screen.

**Estimates Panel**

In the **Estimates Panel**, enter dollars in the **Amount** column as needed.

Field values that are grayed out are auto-populated, and therefore **NON-EDITABLE**. Fields with a peach background are **REQUIRED**. Fields with no background color are **OPTIONAL**.
When finished, click on the **Next** button to continue or click on the **Previous** button to return to the prior screen.

If no Estimate dollars are entered, an error message displays requiring that an amount greater than zero be entered for at least one Phase before going to the next screen. Click on the **OK** button and correct the information before clicking on the **Next** button again.

**Call Application Panel**

The **Call Application** panel will only display if Create a Call Project was selected. In the **Call Application Panel**, enter information as needed.

Field values that are grayed out are auto-populated, and therefore **NON-EDITABLE**. Fields with a peach background are **REQUIRED**. Fields with no background color are **OPTIONAL**.
When finished, click on the **Next** button to continue or click on the **Previous** button to return to the prior screen.

**Districts Panel**

Select the Primary District from the dropdown list.
The sub-districts auto-populate based on the Primary District. Place a checkmark ✓ in the checkbox next to the sub-districts associated with the Project.
When finished, click on the **Next** button to continue or click on the **Previous** button to return to the prior screen.

A Primary District must be added to the Project. An error message displays requiring that one be selected before going to the next screen.

![Message]

**Primary District must be selected.**

Click the **OK** button and add the District information before clicking the **Next** button again.

**Congressional Districts Panel**
Place a checkmark ☑ in the checkbox ☐ next to the Congressional Districts associated with the Project. (The Project may involve more than one Congressional District.)

When finished, click on the **Next** button to continue or click on the **Previous** button to return to the prior screen.

A Congressional District must be selected for the Project. An error message displays requiring that one be selected before going to the next screen.

Click the **OK** button and add the District information before clicking the **Next** button again.
Route and Reference Panel

The Route and Reference Panel has a Route and a Reference section. Click on the Add Route button to add a route to the Project.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.

The Add Route Panel contains two tabs, one to be used to add a route that already exists and one to be used to create a new route and select it for this Project.

1) Select Existing Route

Click on the Select Existing Route tab heading. Select the Route Type and/or County from the dropdown list to return all existing routes of that type within the counties involved in the Project. Click on the green checkmark ✔ to select the desired route from the list.

To filter the list, type the name of the route (or any part of the name) into the Route Name text box and click on the Apply Filter 🔍 icon.
SPMS populates the route information on the main Route and Reference Panel. The Add Route button is replaced with a Remove Route button, which may be used to clear the values from the screen, remove the added route from the Project and display the Add Route button again to add a new route.

2) Add and Select New Route

Click on the Add and Select New Route tab heading. In the Add Screen Mode, select the Route Type and County from the dropdown lists. The values in each list come from the Special Route List. When a new Route is added, it is added to the Special Route List. The Route Number is automatically generated for County Roads and City Streets. For Various Route Types, a Route Number of VARI is automatically generated.
Click on the **Add** button to save the route. SPMS populates the route information with an auto-generated route number on the main **Route and Reference Panel**. The **Add Route** button is replaced with a **Remove Route** button, which can be used to clear the values from the screen, remove the added route and display the **Add Route** button again to add a new route.

Update the **Number of Lanes**, **Reference Post** and **Traffic** information as needed.

When finished, click on the **Next** button to continue or click on the **Previous** button to return to the prior screen.

A Route must be added to the Project. An error message displays requiring that one be added before going to the next screen.
Click the OK button and add the Route and Reference information before clicking the Next button again.

**Project Length Panel**

The Project Length Panel displays the length for each County affected by the Project in miles and kilometers. Lengths may be added, edited, or deleted. It is important to know that no Delete icon appears next to the County that the Project starts in, because that information cannot be deleted. In the example below, the Project begins in Adams County, which cannot be deleted as a Delete icon does not appear.

<table>
<thead>
<tr>
<th>County Code</th>
<th>County Name</th>
<th>Kilometers</th>
<th>Miles</th>
</tr>
</thead>
<tbody>
<tr>
<td>27</td>
<td>Grant</td>
<td>0.000</td>
<td>0.000</td>
</tr>
<tr>
<td>5</td>
<td>Blackford</td>
<td>234.000</td>
<td>146.250</td>
</tr>
</tbody>
</table>

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.

In the **Project Length Panel**, click the Add New icon to the right of the Miles column heading to add a Length.
In the **ADD Screen Mode**, select the **County** from the dropdown list and enter the kilometers or miles in the text box. If one unit of measurement is entered, the other is calculated by SPMS. For example, type the number of miles into the **Miles** text box and hit the Tab key to move the cursor from the field. The number of kilometers appears in the **Kilometers** text box.

Dropdown fields have an auto-complete feature. For example, click on the County dropdown arrow to the right of the field for a complete list of available Counties. Typing a letter in the dropdown field navigates to the first value in the list that begins with that letter. For example, typing a “P” displays “Perry”.
Click on the **Add** button to save the new record and return to the **Project Length Panel** or click on the **Cancel** button to exit without saving. Once saved, the new Project Length should be visible in the List.

SPMS will not save the record or leave the **ADD Screen Mode** if the required fields are empty. Instead, a red **asterisk (•)** will appear to the right of the field and the cursor will blink inside the field.

Once a **Project Length** is added to the List, it can be edited or deleted.

To edit a Project Length, click on the **Edit** icon next to the record to be updated.
Instructions for common functions such as Viewing Details, Applying Filters, Sorting, Showing More Items per Page, and Exporting to Microsoft Excel may be found in the Getting Started section.

In the EDIT Screen Mode, update the miles and kilometers fields as needed. The County may not be edited.

Click on the Cancel button to exit without saving or click on the Update button to save the record and return to the Project Length Panel.

To delete a Project Length, click on the Delete icon next to the record to be removed. It is important to know that no Delete icon appears next to the County that the Project starts in, because that information cannot be deleted.

A confirmation message displays. Click on the OK button to confirm the deletion or click on the Cancel button to exit without saving any changes.
The Project Length is removed from the list.

When finished, click the **Finish** button to continue or click the **Previous** button to return to the prior screen.

When all project information is complete and verified, SPMS assigns a Designation Number, adds the Project to the database with a status of “Call” or “Proposed” based on the selection made at the start of creating the project and Project Proposed Date or Project Call Date is equal to the date the Des # is assigned. A message displays to confirm the Project’s successful addition to the database. Click on the **OK** button to return to the Create a Project initial screen and continue working in SPMS.

**Saving a Draft of a Project**

A **Save a Draft** link is provided at the top of each screen while proposing a Project allowing the User to save the Project being created so work may be continued at a later time. A Draft is saved when the **Next** button is clicked or when the **Save a Draft** link is clicked. SPMS saves your work but does not navigate away from the current screen. Advance by clicking on the **Next** button when ready.

The next time the Create a Project screen is accessed, a reminder displays that there is pending call or proposal work. Click on the **Click here** link to resume work. It is important to know that once the **Start** button is clicked to begin a new Project, the Draft is deleted.
## Create A Project

There is Call / Proposal work pending. Click here to resume using the draft you previously saved.
(Note: Previously saved draft will be deleted if you click on “Start” below.)

To create a Call / Proposal Stand Alone, Lead or Sub Project from the beginning, select the options below and click Start.

- [ ] Create a Call Project
- [ ] Create a Propose Project

![Start Button](image.png)
Project Maintenance

Project Maintenance Main Page

The **Project (Des) Maintenance Main Page** screen is organized into a **Header** and a **Menu Panel**.

**Header**

The Header contains high-level information about the Project from data either entered into SPMS or imported from other databases. It displays at the top of all Des Maintenance screens. The Header also has a link to the Origin Project and Contract Number.

Directly below the Location information in the Header are a **Help** 📑 icon and an **Email SPMS Support** 📧 icon.

**Link to Contract**

This link displays a list of Des numbers for the Contract and displays the Location. From this panel a user may edit the Des.
Instructions for common functions such as Viewing Details, Applying Filters, Sorting, Showing More Items per Page, and Exporting to Microsoft Excel may be found in the Getting Started section.

**Des Maintenance Menu Panel**

The **Menu Panel** is organized into five sections: General Maintenance, Cost Maintenance, Schedule Maintenance, Status Maintenance, and Reports.

The **Routes and Project Length** link has a Refresh icon for updating a Project’s Corporate (the icon does not display for Special Route Projects) route and Project length information. Please refer to the **Routes and Project Length** section for more information.

---

**General Maintenance**

- General Information
- Conditions
- Bridge
- Permit
- Call Application
- Districts
- Routes & Project Lengths
- Rail Crossings
- Utilities
- Change Management

**Cost Maintenance**

- Estimates
- Funding
- Cost Estimate Log Report

**Schedule Maintenance**

- Edit Schedule

**Status Maintenance**

- Change Project Status

**Reports**

- Full Project Listing
- Project Log
- Project Activity Log
Access to links and icons is dependent on a User’s role and security level, as well as the Project’s specific information. If a link is grayed out, its hover tool tip indicates why the option is unavailable. For example, if Signals Required field is not equal to Yes, the Signals icon and link are not available and a tool tip displays the explanation.

For details about User security, refer to Understanding the Screen in the Getting Started section.

**Authorize Activity Schedule**

A Proposed Project’s schedule must be authorized before it can be edited. To authorize a Project schedule, access the Project Maintenance Main Page by clicking on the Edit icon next to the Project’s Des # in the Des Basket or to the right of the Project in the Project Search - Search Results Panel.

**Des Basket**

When authorizing a Project’s schedule, the Project’s status can be made either Active or Provisional.

**Authorize Active Schedule**

To authorize an Active Schedule, click on the Authorize an Active Schedule icon or link in the Schedule Maintenance section of the Project Maintenance Main Page or click on the Authorize Active Schedule icon below the Header on any Project Maintenance Panel.
Access to menu selections, icons and features is dependent on a User’s role and security level. For details, refer to Understanding the Screen in the Getting Started section.

On the Step 1 of 3: Template Type Selection screen, click in the radio button to the left of the template type on which to base the Schedule to select it. Click on the Start button to continue.
On the **Step 2 of 3: Template Selection** screen, checkmarks are placed next to all templates that are associated with the type of template selected in Step 1. Some templates are grayed out and cannot be deselected because they are required for the selected template type. Place a checkmark \( \checkmark \) next to the templates to be added to the Schedule. To deselect a template, click in checkbox to remove the checkmark \( \square \). Click on the **Next** button to continue or the **Previous** button to return to Step 1.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.

On the **Step 3 of 3: Activities Selection** screen, checkmarks are placed next to all activities that are associated with the template selected in Step 2. Some activities are grayed out and cannot be deselected because they are required for the selected template. Place a checkmark \( \checkmark \) next to the activities to be added to the Schedule. To deselect an activity, click in checkbox to remove the checkmark \( \square \).
Edit an activity’s **Duration Days** as needed by typing a new value in the text box in the **Duration Days** column. The number of days must be within the minimum and maximum number of days provided. A pop-up error displays if the number days entered is not valid.

<table>
<thead>
<tr>
<th>Min Duration Days</th>
<th>Max Duration Days</th>
<th>Duration Days</th>
<th>Managing Organization</th>
<th>Contact Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>90</td>
<td>100</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>7</td>
<td>7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>7</td>
<td>7</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Duration Should be in the range of Min Duration and Max Duration

Click in the radio button next to **Start Date** or **RFC Date** if there is a Ready for Contract activity in the template. A date (mm/dd/yyyy) may be entered directly in the field or the Calendar icon may be used to find a date. Click on the **Calendar** icon to display the Calendar window.

Then, click on the desired date to populate the field.

Managing Organization and Contact information for each activity is required. The message below displays if any field is blank.

![Message]

Assign PM activity must have a Managing Organization & Contact Name. Please Contact Administrator.

Click on the **Schedule Project** button to create the Project Baseline Schedule or the **Previous** button to return to Step 2.
On the **Project Baseline Schedule** screen, verify all information and Duration Days calculations are correct and click on the **Authorize Project** button to create the Schedule and open the **Project Maintenance - Edit Schedule Panel**. Click on the **Cancel** button to close the window and return to the Step 3 of 3: Activities Selection screen to make any necessary changes.
If authorizing the Project, a message displays verifying that the authorization was successful. Click on the **Go to Edit Schedule** button to open the **Project Maintenance – Edit Schedule Panel**.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Start Date</th>
<th>Start Status</th>
<th>Finish Date</th>
<th>Finish Status</th>
<th>Duration Days</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Authorized</td>
<td>08/02/2010</td>
<td>U</td>
<td>05/07/2010</td>
<td>L</td>
<td>5</td>
</tr>
<tr>
<td>Generate SPR Project Proposal</td>
<td>08/07/2010</td>
<td>L</td>
<td>08/12/2010</td>
<td>L</td>
<td>5</td>
</tr>
<tr>
<td>Prepare SPR Justification</td>
<td>08/12/2010</td>
<td>L</td>
<td>08/17/2010</td>
<td>L</td>
<td>5</td>
</tr>
<tr>
<td>Submit SPR Justification for Review</td>
<td>08/17/2010</td>
<td>L</td>
<td>08/22/2010</td>
<td>L</td>
<td>5</td>
</tr>
<tr>
<td>Assemble FY SPR Proposal Book</td>
<td>08/22/2010</td>
<td>L</td>
<td>08/27/2010</td>
<td>L</td>
<td>5</td>
</tr>
<tr>
<td>Preliminary INDOT Executive Review</td>
<td>08/27/2010</td>
<td>L</td>
<td>09/01/2010</td>
<td>L</td>
<td>15</td>
</tr>
<tr>
<td>FHWA Eligibility Review</td>
<td>09/01/2010</td>
<td>L</td>
<td>09/21/2010</td>
<td>L</td>
<td>10</td>
</tr>
<tr>
<td>INDOT Commissioner Authorization to Proceed</td>
<td>09/21/2010</td>
<td>L</td>
<td>10/01/2010</td>
<td>L</td>
<td>10</td>
</tr>
<tr>
<td>Authorize Funds for Development</td>
<td>10/01/2010</td>
<td>L</td>
<td>10/13/2010</td>
<td>L</td>
<td>12</td>
</tr>
<tr>
<td>Notice to Proceed</td>
<td>10/01/2010</td>
<td>L</td>
<td>10/07/2010</td>
<td>L</td>
<td>6</td>
</tr>
<tr>
<td>SPR Contract Component #1 (see activity log)</td>
<td>10/07/2010</td>
<td>L</td>
<td>10/07/2011</td>
<td>L</td>
<td>385</td>
</tr>
<tr>
<td>SPR Activity Component #1 (see activity log)</td>
<td>10/07/2010</td>
<td>L</td>
<td>10/07/2011</td>
<td>L</td>
<td>385</td>
</tr>
<tr>
<td>SPR Project 1st Quarterly Review</td>
<td>10/07/2010</td>
<td>L</td>
<td>01/06/2011</td>
<td>L</td>
<td>91</td>
</tr>
</tbody>
</table>

- **Project Start Date**: 8/29/2010
- **Project Finish Date**: 10/18/2011
- **Project Duration (Days)**: 440
The authorized Schedule may then be edited on the **Project Maintenance – Edit Schedule Panel** as shown below. For details, refer to **Edit the Schedule** in the Project Maintenance section. Note that the Project’s status in the Header is now **Active**.
Authorize Provisional Schedule

To authorize a Provisional Schedule, click on the **Authorize a Provisional Schedule** icon or link in the **Schedule Maintenance** section of the **Project Maintenance Main Page** or click on the **Authorize Active Schedule** icon below the Header on any **Project Maintenance Panel**.
Access to menu selections, icons and features is dependent on a User's role and security level. For details, refer to Understanding the Screen in the Getting Started section.

On the Step 1 of 3: Template Type Selection screen, click the radio button to the left of the template type on which to base the Schedule to select it. Click on the Start button to continue.
On the Step 2 of 3: Template Selection screen, checkmarks are placed next to all templates that are associated with the type of template selected in Step 1. Some templates are grayed out and cannot be deselected because they are required for the selected template type. Place a checkmark $\checkmark$ next to the templates to be added to the Schedule. To deselect a template, click in checkbox to remove the checkmark $\Box$. Click on the Next button to continue or the Previous button to return to Step 1.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.

On the Step 3 of 3: Activities Selection screen, checkmarks are placed next to all activities that are associated with the template selected in Step 2. Some activities are grayed out and cannot be deselected because they are required for the selected template. Place a checkmark $\checkmark$ next to the activities to be added to the Schedule. To deselect an activity, click in checkbox to remove the checkmark $\Box$. 


Edit an activity’s **Duration Days** as needed by typing a new value in the text box in the **Duration Days** column. The number of days must be within the minimum and maximum number of days provided. A pop-up error displays if the number days entered is not valid.

<table>
<thead>
<tr>
<th>Min Duration Days</th>
<th>Max Duration Days</th>
<th>Duration Days</th>
<th>Managing Organization</th>
<th>Contact Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>90</td>
<td>100</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>7</td>
<td>7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>7</td>
<td>7</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Click in the radio button next to **Start Date** or **RFC Date** if there is a Ready for Contract activity in the template. A date (mm/dd/yyyy) may be entered directly in the field or the Calendar icon may be used to find a date. Click on the **Calendar** icon to display the Calendar window.

Then, click on the desired date to populate the field.

Managing Organization and Contact information for each activity is required. The message below displays if any field is blank.

**Assign PM activity must have a Managing Organization & Contact Name. Please Contact Administrator.**

Click on the **Schedule Project** button to create the Project Baseline Schedule or the **Previous** button to return to Step 2.
On the **Project Baseline Schedule** screen, verify all information and Duration Days calculations are correct and click on the **Authorize Project** button to create the Schedule and open the **Project Maintenance - Edit Schedule Panel**. Click on the **Cancel** button to close the window and return to the **Step 3 of 3: Activities Selection** screen to make any necessary changes.
If authorizing the Project, a message displays verifying that the authorization was successful. Click on the **Go to Edit Schedule** button to open the **Project Maintenance – Edit Schedule Panel**.
The authorized Schedule may then be edited on the **Project Maintenance – Edit Schedule Panel** as shown below. For details, refer to the [Edit the Schedule](#) in the Project Maintenance section. Note that the Project's status in the Header is now **Provisional**.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Start Date</th>
<th>Start Status</th>
<th>Finish Date</th>
<th>Finish Status</th>
<th>Duration Days</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Authorized</td>
<td>10/12/2010</td>
<td>U</td>
<td>10/17/2010</td>
<td>L</td>
<td>5</td>
</tr>
<tr>
<td>Generate SPR Project Proposal</td>
<td>10/17/2010</td>
<td>L</td>
<td>10/22/2010</td>
<td>L</td>
<td>5</td>
</tr>
<tr>
<td>Prepare SPR Justification</td>
<td>10/22/2010</td>
<td>L</td>
<td>10/27/2010</td>
<td>L</td>
<td>5</td>
</tr>
<tr>
<td>Submit SPR Justification for Review</td>
<td>10/27/2010</td>
<td>L</td>
<td>11/01/2010</td>
<td>L</td>
<td>5</td>
</tr>
<tr>
<td>Assemble FY SPR Proposal Book</td>
<td>11/01/2010</td>
<td>L</td>
<td>11/06/2010</td>
<td>L</td>
<td>6</td>
</tr>
<tr>
<td>Preliminary INDOT Executive Review</td>
<td>11/06/2010</td>
<td>L</td>
<td>11/21/2010</td>
<td>L</td>
<td>15</td>
</tr>
<tr>
<td>FHWA Eligibility Review</td>
<td>11/21/2010</td>
<td>L</td>
<td>12/01/2010</td>
<td>L</td>
<td>10</td>
</tr>
<tr>
<td>INDOT Commissioner Authorization to Proceed</td>
<td>12/01/2010</td>
<td>L</td>
<td>12/11/2010</td>
<td>L</td>
<td>10</td>
</tr>
<tr>
<td>Notes to Proceed</td>
<td>12/11/2010</td>
<td>L</td>
<td>12/17/2010</td>
<td>L</td>
<td>6</td>
</tr>
<tr>
<td>SPR Activity Component #1 (see activity log)</td>
<td>12/17/2010</td>
<td>L</td>
<td>12/17/2011</td>
<td>L</td>
<td>365</td>
</tr>
<tr>
<td>SPR Project 1st Quarterly Review</td>
<td>12/17/2010</td>
<td>L</td>
<td>03/18/2011</td>
<td>L</td>
<td>81</td>
</tr>
</tbody>
</table>

Project Authorized successfully.

[Go to Edit Schedule...]
Bridge

An SPMS project may involve maintaining a bridge, replacing a bridge or building a new bridge. The SPMS Corporate Bridge list is used to select a bridge to maintain or a bridge to replace. When building a new bridge the bridge is not added to the Corporate Bridge list until the work is completed.

Sufficiency rating data and National Bridge Inventory (NBI #) is maintained by the INDOT Bridge section. Sufficiency ratings for Bridges are updated in the Corporate Bridge List when the INDOT Bridge section receives updates from the Federal Highway Association (FHWA). This schedule usually occurs once a year around July. National Bridge Inventory (NBI #) for a bridge is determined by the Bridge Inspection Unit and is assigned to a new bridge at the completion of being built. A new NBI # is also assigned to a bridge that is being replaced at the completion of being built.

Structure number is assigned to a new bridge being built and a new Structure number is assigned to a bridge being replaced. A bridge being maintained will keep the existing structure number. Structure numbers are assigned by the SPMS application for bridge types of State and Railroad. For bridge types of County and Toll Road the structure number is determined by the Owner (County and Toll Road).

Project bridge information is added and maintained here, in the Bridge section of the Project Maintenance Main Page.
To maintain a Project, access the **Project Maintenance Main Page** by clicking on the **Edit** icon next to the Project’s Des # in the Des Basket or to the right of the Project in the Project Search - Search Results Panel.

Des Basket

![Des Basket](image)

**Project Search - Search Results Panel**

<table>
<thead>
<tr>
<th>Des #</th>
<th>Contract #</th>
<th>Work Type</th>
<th>Designed By</th>
<th>Location</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1005784</td>
<td></td>
<td>Other Type Project (Miscellaneous)</td>
<td>State</td>
<td>MS SPR, SPR-510(408)</td>
<td>Active</td>
</tr>
</tbody>
</table>

![Search Result](image)

Access to menu selections, icons and features is dependent on a User’s role and security level. For details, refer to **Understanding the Screen** in the Getting Started section.

Click on the **Bridge** icon or link ![Bridge](image) in the **General Maintenance** section of the **Project Maintenance Main Page** or click on the **Bridge** icon below the Header on any **Project Maintenance Panel**.
Adding a New Bridge

From the **No Bridge Assigned – Select a Bridge for Des# Panel**, a new Bridge may be added by clicking on the **Add New Bridge** icon to the right of the **Status Date** column heading.

If no Bridge has been assigned to the Project, the **No Bridge Assigned – Select a Bridge for Des# Panel** displays. Once a Bridge has been assigned, the **Proposed Bridge Panel** displays. Only one Bridge may be assigned to a Project.
Instructions for common functions such as Viewing Details, Applying Filters, Sorting, Showing More Items per Page, and Exporting to Microsoft Excel may be found in the Getting Started section.

In the Proposed Bridge Panel, select the Bridge Type, Description and County from the dropdown lists. Counties displayed in the dropdown list are determined by the location of the Project.

The National Bridge Inventory (NBI) Number is added when the building of the bridge is finished and the Project is completed.

Enter the Structure Number for County and Toll Road bridge types. For all other bridge types, the Structure number is assigned by SPMS.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.

Bridge Prefix information should be entered with dashes, rather than slashes; for example, Road Number – County Number (345-10), not Road Number / County Number (345/10).

<table>
<thead>
<tr>
<th>Bridge Type</th>
<th>NBI Number</th>
<th>County</th>
<th>Description</th>
<th>Status</th>
<th>Status Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>State</td>
<td>1480</td>
<td>Elkhart</td>
<td>Conversion</td>
<td>Active</td>
<td>01-Jan-2000</td>
</tr>
<tr>
<td>State</td>
<td>1490</td>
<td>Elkhart</td>
<td>Conversion</td>
<td>Active</td>
<td>01-Jan-2000</td>
</tr>
<tr>
<td>State</td>
<td>1495</td>
<td>Elkhart</td>
<td>Conversion</td>
<td>Active</td>
<td>01-Jan-2000</td>
</tr>
<tr>
<td>State</td>
<td>1760</td>
<td>Elkhart</td>
<td>Conversion</td>
<td>Active</td>
<td>01-Jan-2000</td>
</tr>
<tr>
<td>State</td>
<td>1770</td>
<td>Elkhart</td>
<td>Conversion</td>
<td>Active</td>
<td>01-Jan-2000</td>
</tr>
<tr>
<td>State</td>
<td>1780</td>
<td>Elkhart</td>
<td>Conversion</td>
<td>Active</td>
<td>01-Jan-2000</td>
</tr>
<tr>
<td>State</td>
<td>1790</td>
<td>Elkhart</td>
<td>Conversion</td>
<td>Active</td>
<td>01-Jan-2000</td>
</tr>
<tr>
<td>State</td>
<td>3030</td>
<td>Elkhart</td>
<td>Conversion</td>
<td>Active</td>
<td>01-Jan-2000</td>
</tr>
<tr>
<td>State</td>
<td>3540</td>
<td>Elkhart</td>
<td>Conversion</td>
<td>Active</td>
<td>01-Jan-2000</td>
</tr>
<tr>
<td>State</td>
<td>3560</td>
<td>Elkhart</td>
<td>Conversion</td>
<td>Active</td>
<td>01-Jan-2000</td>
</tr>
</tbody>
</table>
Dropdown fields have an auto-complete feature. For example, click on the Description dropdown arrow to the right of the field for complete lists of available descriptions. Typing any letter in a dropdown field navigates to the first value in the list that begins with that letter. For example, typing an “O” displays “Over abandoned railroad”.

Click the **Save** button to save the new record or click the **Cancel** button to exit without saving. If saving, click on the **OK** button at the confirmation message.
SPMS will not save the record or leave the ADD Screen Mode if a required field is left empty. Instead, a red asterisk (*) will appear to the right of the field and the cursor will blink inside the field.

SPMS does not allow duplicates. If the record already exists in the database, a message displays.

Then, click on the Cancel button to return to the Project Maintenance Main Page or another icon in the Icon Bar to open a different Project Maintenance Panel.

The next time the Bridge icon is selected, the Proposed Bridge Panel is opened and the details of the proposed new Bridge are displayed.

Selecting an Existing Bridge for Maintenance

If the Project requires work on an existing Bridge, that Bridge must be in the Corporate Bridge List and selected from the No Bridge Assigned – Select a Bridge Panel. Sort the List by NBI Number to locate it easily.
If no Bridge has been assigned to the Project, the **No Bridge Assigned** – **Select a Bridge for Des# Panel** displays. Once a Bridge has been assigned, the **Maintain Bridge Panel** displays. This is because only one Bridge may be assigned to a Project.

Click on the **Maintain Bridge** icon next to the record to be updated.

<table>
<thead>
<tr>
<th>Bridge Type</th>
<th>NBI Number</th>
<th>County</th>
<th>Description</th>
<th>Status</th>
<th>Status Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>State</td>
<td>1480</td>
<td>Elkhart</td>
<td>Conversion</td>
<td>Active</td>
<td>01-Jan-2000</td>
</tr>
<tr>
<td>State</td>
<td>1490</td>
<td>Elkhart</td>
<td>Conversion</td>
<td>Active</td>
<td>01-Jan-2000</td>
</tr>
<tr>
<td>State</td>
<td>1495</td>
<td>Elkhart</td>
<td>Conversion</td>
<td>Active</td>
<td>01-Jan-2000</td>
</tr>
<tr>
<td>State</td>
<td>1760</td>
<td>Elkhart</td>
<td>Conversion</td>
<td>Active</td>
<td>01-Jan-2000</td>
</tr>
<tr>
<td>State</td>
<td>1770</td>
<td>Elkhart</td>
<td>Conversion</td>
<td>Active</td>
<td>01-Jan-2000</td>
</tr>
<tr>
<td>State</td>
<td>1780</td>
<td>Elkhart</td>
<td>Conversion</td>
<td>Active</td>
<td>01-Jan-2000</td>
</tr>
<tr>
<td>State</td>
<td>1790</td>
<td>Elkhart</td>
<td>Conversion</td>
<td>Active</td>
<td>01-Jan-2000</td>
</tr>
<tr>
<td>State</td>
<td>3530</td>
<td>Elkhart</td>
<td>Conversion</td>
<td>Active</td>
<td>01-Jan-2000</td>
</tr>
<tr>
<td>State</td>
<td>3540</td>
<td>Elkhart</td>
<td>Conversion</td>
<td>Active</td>
<td>01-Jan-2000</td>
</tr>
<tr>
<td>State</td>
<td>3560</td>
<td>Elkhart</td>
<td>Conversion</td>
<td>Active</td>
<td>01-Jan-2000</td>
</tr>
</tbody>
</table>

Instructions for common functions such as **Viewing Details**, **Applying Filters**, **Sorting**, **Showing More Items per Page**, and **Exporting to Microsoft Excel** may be found in the Getting Started section.

In the **Maintain Bridge Screen Mode**, the only editable field is **Designator**.

Field values that are grayed out are auto-populated, and therefore **NON-EDITABLE**. Fields with a peach background are **REQUIRED**. Fields with no background color are **OPTIONAL**.
Click the Save button to save the new record or click on the Cancel button to exit without saving. If saving, click on the OK button at the confirmation message.

Then, click on the Cancel button to return to the Project Maintenance Main Page or another icon in the Icon Bar to open a different Project Maintenance Panel.

The next time the Bridge Panel is opened, the details of the selected Bridge display.
Selecting an Existing Bridge for Replacement

If the Project requires the replacement of an existing Bridge, that Bridge must be in the Corporate Bridge List and selected from the No Bridge Assigned – Select a Bridge Panel. Sort the List by NBI Number to locate it easily.

If no Bridge has been assigned to the Project, the No Bridge Assigned – Select a Bridge for Des# Panel displays. Once a Bridge has been assigned, the Maintain Bridge Panel displays. This is because only one Bridge may be assigned to a Project.

Click on the Replace Bridge icon next to the record to be updated.
Instructions for common functions such as Viewing Details, Applying Filters, Sorting, Showing More Items per Page, and Exporting to Microsoft Excel may be found in the Getting Started section.

In the Replace Bridge Screen Mode, the only editable field is Designator.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.
Click the **Save** button to save the new record or click on the **Cancel** button to exit without saving. If saving, click on the **OK** button at the confirmation message.

![Message dialog with text: New item has been added successfully.]

Then, click on the **Cancel** button to return to the **Project Maintenance Main Page** or another icon in the **Icon Bar** to open a different **Project Maintenance Panel**.

![Project Maintenance Main Page icon bar]

The next time the **Bridge Panel** is opened, the details of the selected Bridge display.

![Bridge Panel with details]

**Call Application**

To access **Call Application**, enter the **Des #**, and then open **Project Status** panel and check the **Call-C** box; hit enter and the **Call-C** appears in red next to **Project Status** panel and the **Search Result** panel is displayed.
Access to menu selections, icons and features is dependent on a User’s role and security level. For details, refer to **Understanding the Screen** in the Getting Started section.

You have **3483** project messages.

<table>
<thead>
<tr>
<th>Des #</th>
<th>Contract #</th>
<th>Land Acq. Code</th>
<th>Corridor #</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1173277</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Bridge Structure
- Congressional District
- County
- Designed By
- District
- Letting
- Management
- Project Status (Call-C)

- Active-A
- Call-C
- Eliminated-E
- Historical-H
- Proposed-P
- Provisional-V
- Shelled-R
- Suspended-S

- Include Archive Projects also
- Include Archive Projects only

**Program Class**
- Route
- Sponsor
- Work Type
- More Fields

**Search Result**

<table>
<thead>
<tr>
<th>Des #</th>
<th>Contract #</th>
<th>Work Type</th>
<th>Designed By</th>
<th>Location</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1173277</td>
<td></td>
<td>Pavement Replacement</td>
<td>State</td>
<td>I 74, test call project</td>
<td></td>
</tr>
</tbody>
</table>

**Showing 1 of 1**

**Items Per Page**
- 10
- 25
- 50
- 100
- All

**Project Types**
- ■ Lead Project
- ■ Stand-alone Project
- ■ Sub Project

Instructions for common functions such as **Viewing Details**, **Applying Filters**, **Sorting**, **Showing More Items per Page**, and **Exporting to Microsoft Excel** may be found in the Getting Started section.

There are five functions associated with the **Search Result** panel: **Add to Des Basket** icon, **Des Maintenance** icon, **Edit Schedule** icon, **Funding** icon, and the **Full Project Listing Report** icon. In addition one may export to Excel by utilizing the **Export to Excel** icon and the **Add All to Des Basket** icon.

Click the **Des Maintenance** icon and the **Project Maintenance-Main** panel is displayed.
Select and click on the Call Application icon and the Call Application panel is displayed
Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.

SPMS will not advance to the next screen if a required field is left empty. A red asterisk (*) will appear to the right of the field. The cursor will blink inside text fields while dropdown fields will be highlighted.

Click the **Save** button to save the new information for the record as displayed in the **Call Application** panel or click on the **Cancel** button to exit without saving. If saving, click on the **OK** button at the confirmation message.
Call Application Report

To access the Call Application Report, click on the Pdf Icon or the Call Application Report to the right of the Application Name, and report is displayed.
Searching Contact

To search for a new contact, click the **Search** Icon located next to the **Applicant Name** and the **Assign Contact** panel is displayed. Type the name for the **Contact Name**, click the **Find** 📢 Icon and the name found is placed in the Contact Name box.
Click the **Add Contact** button to assign the contact, or click the **Cancel** button to exit. When the **Add Contact** name is added, the name appears as grayed in the **Call Application** panel.

![Call Application](image)

**Change Project Status**

The status of a Project may be changed while maintaining the Project. Access the **Project Maintenance Main Page** by clicking on the **Edit** icon next to the Project’s Des # in the Des Basket or to the right of the Project in the **Project Search - Search Results Panel**.

![Des Basket](image)

**Des Basket**

**Project Search - Search Results Panel**

![Project Search](image)

Access to menu selections, icons and features is dependent on a User’s role and security level. For details, refer to [Understanding the Screen](#) in the Getting Started section.
To change the status of a Project, click on the **Change Project Status** icon or link in the **General Maintenance** section of the **Project Maintenance Main Page** or click on the **Change Project Status** icon below the Header on any **Project Maintenance Panel**.

 Valid status selections are dependent on the current status of the Project. For example, if the Project is Active (the Project's status is shown in the Header), the Project may be eliminated, suspended, made historical, or made shelf-ready from the **Change Status Panel**.
However, if the Project is Provisional, the Project may be eliminated, suspended, or reactivated.

The table below shows what options are available for each Project Status.

<table>
<thead>
<tr>
<th>Project Status</th>
<th>Eliminate Project</th>
<th>Make Project Historical</th>
<th>Reactivate Project</th>
<th>Make Project Shelf-Ready</th>
<th>Suspend Project</th>
<th>Archive Project (Admin Only)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Call</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Proposed</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Suspended</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Provisional</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shelf-Ready</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Eliminated</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Historical</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

SPMS displays messages if a Project’s status cannot be changed. Some examples are provided below:

An Active Project may only be suspended twice.
A Project may not be made Shelf-Ready unless its Ready for Contracts Activity is completed.

A Project may not be made Historical until all Activities in the Project’s schedule are completed or marked as “Not Applicable”.

If a Project is associated with a Contract, the Des must be removed from the Contract in Contract Management before eliminating the Project.
If the Project is the lead Project with sub-projects, identify a new Lead Project for the sub-projects before removing the Project.

Before the Des can be eliminated, it must be removed from the Contract in Contract Management. If the Des is the Lead, before removing it from the Contract, identify another Des as the Lead.

When a Project’s status is changed, SPMS updates the Status Date and requires the User to add an entry to the Project Log. In the ADD Screen Mode, enter information as needed.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.

Dropdown fields have an auto-complete feature. For example, click on the Log Subject dropdown arrow to the right of the field for a complete list of available Subjects. Typing a letter in the dropdown field navigates to the first value in the list that begins with that letter. For example, typing a “C” displays “Conversation”.

* This color background fields are mandatory
Click the **Save** button to save the new record and return to the main SPMS screen or click on the **Cancel** button to exit without saving. If saving, click on the **OK** button at the confirmation message.

**Message**

*Project Status changed successfully.*

SPMS will not save the record or leave the **ADD Screen Mode** if a required field is left empty. Instead, a red **asterisk (**) will appear to the right of the field. The cursor will blink inside text fields while dropdown fields will be highlighted.
Once saved successfully, the new Log entry should be visible in the Project Log and the Project Status is updated. To view the Project Log, click on the Project Log icon or link on the Project Maintenance Main Page, and, if necessary, sort the list so the most recent entries appear at the top.

Instructions for common functions such as Sorting may be found in the Getting Started section.

When finished, click on the Cancel button to return to the Project Maintenance Main Page or another icon in the Icon Bar to open a different Project Maintenance Panel.

Conditions

Conditions and recommendations resulting from Project inspections are maintained in the Conditions Panel.

To maintain a Project, access the Project Maintenance Main Page by clicking on the Edit icon next to the Project’s Des # in the Des Basket or to the right of the Project in the Project Search - Search Results Panel.

Des Basket

Project Search - Search Results Panel

Click on the Conditions icon or link in the General Maintenance section of the Project Maintenance Main Page or click on the Conditions icon below the Header on any Project Maintenance Panel.
From the **Conditions Panel**, Conditions may be added, edited, or deleted.

Access to menu selections, icons and features is dependent on a User’s role and security level. For details, refer to [Understanding the Screen](#) in the Getting Started section.

Instructions for common functions such as [Viewing Details](#), [Applying Filters](#), [Sorting](#), [Showing More Items per Page](#), and [Exporting to Microsoft Excel](#) may be found in the Getting Started section.
Adding a Condition

To add a Condition, click on the Add New icon to the right of the Reviewer column heading.

In the ADD Screen Mode, enter information as needed. It is important to select the Inspection Type first, and then Reviewing Organization, as dropdown lists are populated with valid choices based on this information.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.

Dropdown fields have an auto-complete feature. For example, click on the Reviewing Organization dropdown arrow to the right of the field for a complete list of available Organizations (dependent on the Inspection Type choice of In-House or Consulting). Typing a letter in the dropdown field navigates to the first value in the list that begins with that letter. For example, typing an “L” displays “Land Consultants”.
Date fields have two options. A date (mm/dd/yyyy) may be entered directly in the field or the Calendar icon may be used to find a date. Click on the Calendar icon to display the Calendar window.

Then, click on the desired date to populate the field.

Click the Save button to save the new record and return to the Conditions Panel or click on the Cancel button to exit without saving. If saving, click on the OK button at the confirmation message.
SPMS will not save the record or leave the **ADD Screen Mode** if a required field is left empty. Instead, a red **asterisk** (*) will appear to the right of the field and the cursor will blink inside the field.

**Message**

New item has been added successfully.

SPMS does not allow duplicates. If the record already exists in the database, a message displays.

**Message**

Record already exists

Once saved, the new Condition should be visible in the List. If not, click on the **Reviewer** column heading twice to re-sort and refresh the List or use the Filter feature to locate the new record.

Then, click on the **Cancel** button to return to the **Project Maintenance Main Page** or another icon in the **Icon Bar** to open a different **Project Maintenance Panel**.

**Editing a Condition**

To edit a Condition, click on the **Edit** icon next to the record to be updated.

In the **EDIT Screen Mode**, update fields as needed.
Field values that are grayed out are auto-populated, and therefore **NON-EDITABLE**. Fields with a peach background are **REQUIRED**. Fields with no background color are **OPTIONAL**.

**Screen Mode: EDIT**

**Inspection Date**: 08/13/2010

**Inspection Type**: Consulting

**Reviewing Organization**: Charlier, Clark & Linard, PC (101017)

**Reviewer**: Hendry, Fransiska

**Existing Condition**:  

**Recommendation**:  

Click the **Save** button to save the new record and return to the **Conditions Panel** or click on the **Cancel** button to exit without saving. If saving, click on the **OK** button at the confirmation message.

**Message**

*New item has been added successfully.*

OK
SPMS will not save the record or leave the **EDIT Screen Mode** if a required field is left empty. Instead, a red asterisk (*) will appear to the right of the field and the cursor will blink inside the field.

```
<table>
<thead>
<tr>
<th>Inspection Type</th>
</tr>
</thead>
</table>
```

The changes should be visible in the List. If not, click on the any column heading to re-sort and refresh the List or use the Filter feature to locate the updated record.

Then, click on the **Cancel** button to return to the **Project Maintenance Main Page** or another icon in the **Icon Bar** to open a different **Project Maintenance Panel**.

### Deleting a Condition

To delete a Condition, click on the **Delete** icon next to the record to be removed.

A confirmation message displays. Click on the **OK** button to confirm the deletion or click on the **Cancel** button to exit without saving any changes.

```
Message from webpage
Are you sure you want to delete this record?

OK  Cancel
```

The Condition is removed from the list.

Then, click on the **Cancel** button to return to the **Project Maintenance Main Page** or another icon in the **Icon Bar** to open a different **Project Maintenance Panel**.

### Congressional Districts

A Project's Congressional Districts are selected in the **Congressional Districts Panel**.

To maintain a Project, access the **Project Maintenance Main Page** by clicking on the **Edit** icon next to the Project's Des # in the Des Basket or to the right of the Project in the Project Search - Search Results Panel.

**Des Basket**
Access to menu selections, icons and features is dependent on a User’s role and security level. For details, refer to Understanding the Screen in the Getting Started section.

Click on the Congressional Districts icon or link in the General Maintenance section of the Project Maintenance Main Page or click on the Congressional Districts icon below the Header on any Project Maintenance Panel.
District information for **Corporate Route Projects** is auto-populated from other systems when a Project is proposed. Fields for these Projects are grayed out as shown below. Congressional Districts are only editable for **Special Route Projects**.
### Congressional Districts

<table>
<thead>
<tr>
<th>Select</th>
<th>Code</th>
<th>Congressional District Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>✔</td>
<td>09</td>
<td>District 9</td>
</tr>
<tr>
<td></td>
<td>01</td>
<td>District 1</td>
</tr>
<tr>
<td></td>
<td>02</td>
<td>District 2</td>
</tr>
<tr>
<td></td>
<td>03</td>
<td>District 3</td>
</tr>
<tr>
<td></td>
<td>04</td>
<td>District 4</td>
</tr>
<tr>
<td></td>
<td>05</td>
<td>District 5</td>
</tr>
<tr>
<td></td>
<td>06</td>
<td>District 6</td>
</tr>
<tr>
<td></td>
<td>07</td>
<td>District 7</td>
</tr>
<tr>
<td></td>
<td>08</td>
<td>District 8</td>
</tr>
<tr>
<td></td>
<td>10</td>
<td>District 10</td>
</tr>
<tr>
<td></td>
<td>99</td>
<td>Multiple Districts</td>
</tr>
</tbody>
</table>

Place a checkmark ✔ in the **Select** column of the Congressional District(s) to be included. To deselect a Congressional District, click in its **Select** column to remove the checkmark ☐.
Click the **Save** button to save the updates or click on the **Cancel** button to exit without saving.

After saving, click on the **Cancel** button to return to the **Project Maintenance Main Page** or another icon in the **Icon Bar** to open a different **Project Maintenance Panel**.

---

**Contract Management**

Contracts are the binding legal agreements pertaining to the work specifications of a Project. Projects/Designation #’s should be assigned to a Contract when the Project’s status is made Active.

A Project’s **Contract Prefix** and **Contract Number** appear in the **Header** section of the **Project Maintenance Panels**. The **Contract Prefix** indicates the type of work associated with that Contract.

To maintain **Contracts**, select **Contract Management** from the **Projects** menu.

From the **Contract Maintenance Panel**, Contracts may be added, edited, or deleted.

Access to menu selections, icons and features is dependent on a User’s role and security level. For details, refer to **Understanding the Screen** in the Getting Started section.
Instructions for common functions such as Viewing Details, Applying Filters, Sorting, Showing More Items per Page, and Exporting to Microsoft Excel may be found in the Getting Started section.

Adding a Contract

To add a Contract and select its Projects/Designation Numbers, click on the Add New icon to the right of the Amount column heading. The Contract Items Maintenance Panel displays with Contract Number = New. The Number is assigned when at least one Project is selected and the Save button is clicked.

Any Designation Number with a Project Status not equal to Historical, Eliminated, or Archived and not already assigned to a Contract appears in the List.

Certain business rules must be met for a Project to be added to a Contract. (Some Designation Numbers in the List are grayed out and cannot be selected.)

A Designation Number must have a Contract Prefix to be selectable.
A Designation Number must have a Letting Date to be selectable.
A Designation Number’s Letting Status must not be “C” (Completed) to be selectable.

When selecting multiple Designation Numbers, all Contract Prefixes, Letting Finish Dates, and Work Categories must be the same.

If any of this information needs to be corrected or updated, click on the Des Maintenance icon to open the Project Maintenance Main Page. Navigate to the necessary Panel, make changes and save. The Contract Items Maintenance Panel must be refreshed by clicking on the Items icon in the Contract Maintenance Panel.
Projects may be added to or removed from the Contract in the **Contract Items Maintenance Panel** by clicking in the **Select** column to place ✔ or remove □ the checkmark in that Designation Number’s **Select** checkbox.

If more than one Project is selected, one must be identified as the **Lead Project**. A checkmark must be placed ✔ in that Designation Number’s **Lead** checkbox. A Lead Project is not allowed for Contracts with only one Project.

The **Project Maintenance - General Information Panel** provides Lead Project status in the non-editable **Lead Project** field.

SPMS displays messages if a Contract’s updates are not allowed based on business rules. Some examples are provided below:

At least one Project must be selected to save a new Contract.
A Lead Project cannot be selected for Contracts with only one selected Designation Number.

A Lead Project must be selected for Contracts with more than one selected Designation Number.

When selecting multiple Designation Numbers, all **Contract Prefixes**, **Letting Finish Dates**, and **Work Categories** must be the same.

Click the **Save** button to save the new Contract or click on the **Cancel** button to exit without saving. If saving, note the **Contract Number**, and click on the **OK** button at the confirmation message. Then, click on the **Cancel** button to return to the **Contract Maintenance Panel**.

Once saved, the new Contract should be visible in the List. If not, click on the **Contract Number** column heading to re-sort and refresh the List or use the **Filter** feature to locate the new record.
Editing a Contract

To work with a specific Contract, click on the **Items** icon next to that record in the **Contract Maintenance Panel**. The Contract Items Maintenance Panel displays with any Designation Numbers already added to the Project at the top of the List. The rest of the List contains Designation Numbers with a Project Status not equal to Historical, Eliminated, or Archived, and not already assigned to a Contract.

<table>
<thead>
<tr>
<th>Select</th>
<th>Lead</th>
<th>Designation Number</th>
<th>Origin</th>
<th>Status</th>
<th>Work Category</th>
<th>Work Type</th>
<th>Listing Date</th>
<th>Listing Status</th>
<th>Contract Prefix</th>
</tr>
</thead>
<tbody>
<tr>
<td>✔</td>
<td></td>
<td>0676830</td>
<td>8676830</td>
<td>Historical</td>
<td>Local Bridge Project</td>
<td>Bridge Replacement</td>
<td>04/07/1987</td>
<td>C</td>
<td>B</td>
</tr>
<tr>
<td></td>
<td></td>
<td>0611840</td>
<td>0611840</td>
<td>Active</td>
<td>District Improvement Project</td>
<td>Intersection Improvement</td>
<td>05/26/2010</td>
<td>T</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>0612640</td>
<td>0612640</td>
<td>Suspended</td>
<td>Major Bridge Project/ New</td>
<td>New Bridge Construction</td>
<td>05/25/2009</td>
<td>L</td>
<td>B</td>
</tr>
<tr>
<td></td>
<td></td>
<td>0613470</td>
<td>0613470</td>
<td>Suspended</td>
<td>Intersection Improvement Project</td>
<td>Intersection Improvement</td>
<td>05/26/2009</td>
<td>L</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>0613710</td>
<td>0613710</td>
<td>Professional</td>
<td>Major Pavement Project (Non-NIH)</td>
<td>Road Rehabilitation (CIRMR Standard)</td>
<td>09/26/2009</td>
<td>L</td>
<td>R</td>
</tr>
<tr>
<td></td>
<td></td>
<td>0613730</td>
<td>0613730</td>
<td>Professional</td>
<td>Small Town Reconstruction</td>
<td>Pavement Replacement, Small Town</td>
<td>11/25/2009</td>
<td>L</td>
<td>R</td>
</tr>
<tr>
<td></td>
<td></td>
<td>0613820</td>
<td>0613820</td>
<td>Professional</td>
<td>District Pavement Project (Non-1)</td>
<td>HMA Overlay, Functional</td>
<td>12/25/2009</td>
<td>L</td>
<td>R</td>
</tr>
<tr>
<td></td>
<td></td>
<td>0614630</td>
<td>0614630</td>
<td>Professional</td>
<td>Major Pavement Project (NH-1)</td>
<td>Pavement Repair Or Rehabilitation</td>
<td>09/25/2009</td>
<td>L</td>
<td></td>
</tr>
</tbody>
</table>

Projects may be added to or removed from the Contract in the **Contract Items Maintenance Panel** by clicking in the **Select** column to place ✔ or remove □ the checkmark in that Designation Number’s **Select** checkbox.

If more than one Project is selected, one must be identified as the **Lead Project**. A checkmark must be placed ✔ in that Designation Number’s **Lead** checkbox. A Lead Project is not allowed for Contracts with only one Project.

The **Project Maintenance - General Information Panel** provides Lead Project status in the non-editable **Lead Project** field.

SPMS displays messages if a Contract’s updates are not allowed based on business rules. Some examples are provided below:
At least one Project must be selected to save a new Contract.

A Lead Project cannot be selected for Contracts with only one selected Designation Number.

A Lead Project must be selected for Contracts with more than one selected Designation Number.

When selecting multiple Designation Numbers, all Contract Prefixes, Letting Finish Dates, and Work Categories must be the same.

Click the Save button to save the updated Contract or click on the Cancel button to exit without saving. If saving, click on the OK button at the confirmation message. Then, click on the Cancel button to return to the Contract Maintenance Panel.
Once saved, the updated Contract should be visible in the List. If not, click on the **Contract Number** column heading to re-sort and refresh the List or use the **Filter** feature to locate the new record.

**Deleting a Contract**

To delete a **Contract**, click on the **Delete** icon next to the record to be removed. If any Designation Number added to a Contract has a Letting Status equal to “C” (Complete), the **Delete** icon does not appear next to that Contract.

A confirmation message displays. Click on the **OK** button to confirm the deletion or click on the **Cancel** button to exit without saving any changes.

The **Contract** is removed from the list and the **Contract Number** is removed from all Designation Numbers. The Contract Number will never be reused by SPMS.

**Districts**

A Project’s Primary District and Sub-Districts are selected in the **Districts Panel**.

To maintain a Project, access the **Project Maintenance Main Page** by clicking on the **Edit** icon next to the Project’s Des # in the Des Basket or to the right of the Project in the Project Search - Search Results Panel.

**Des Basket**
Project Search - Search Results Panel

<table>
<thead>
<tr>
<th>Des #</th>
<th>Contract #</th>
<th>Work Type</th>
<th>Designed By</th>
<th>Location</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1005794</td>
<td></td>
<td>Other Type Project (Miscellaneous)</td>
<td>State</td>
<td>MS SPR, SPR-510(416)</td>
<td>Active</td>
</tr>
</tbody>
</table>

Access to menu selections, icons and features is dependent on a User's role and security level. For details, refer to [Understanding the Screen](#) in the Getting Started section.

Click on the **Districts** icon or link in the **General Maintenance** section of the Project Maintenance Main Page or click on the **Districts** icon below the Header on any Project Maintenance Panel.
District information for **Corporate Route Projects** is auto-populated from other systems when a Project is proposed. Fields for these Projects are grayed out as shown below. Districts are only editable for **Special Route Projects**.
At the Districts Panel, first select the Project’s Primary District from the dropdown list.

Place a checkmark □ in the Select column of the Sub-District(s) to be included. To deselect a Sub-District, click in its Select column to remove the checkmark □.

Click the Save button to save the updates or click on the Cancel button to exit without saving.

After saving, click on the Cancel button to return to the Project Maintenance Main Page or another icon in the Icon Bar to open a different Project Maintenance Panel.

Edit Schedule
After a Project has been authorized, its Schedule must be maintained. As activities are completed, estimates are updated based on the business rules.

To maintain a Project, access the **Project Maintenance Main Page** by clicking on the **Edit** icon next to the Project’s Des # in the Des Basket or to the right of the Project in the Project Search - Search Results Panel.

**Des Basket**

![Des Basket](image)

**Project Search - Search Results Panel**

![Project Search - Search Results Panel](image)

Access to menu selections, icons and features is dependent on a User’s role and security level. For details, refer to **Understanding the Screen** in the Getting Started section.

Click on the **Edit Schedule** icon or link ![Edit Schedule](image) in the **Schedule Maintenance** section of the **Project Maintenance Main Page** or click on the **Edit Schedule** ![Edit Schedule](image) icon below the Header on any **Project Maintenance Panel**.

From the **Edit Schedule Panel**, the Schedule’s template, activities, statuses, contacts and predecessors may be maintained.
Editing an Activity

An Activity’s **Start** and **Finish Status** and **Estimated Actual Start** and **Finish Dates** may be edited in the **Edit Schedule Panel**.
Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.

**Change the Start Status and/or Start Date**
Click on the Activity's Start Status link to assign a new Start Date.

On the Change Start Status screen, select from the New Start Status dropdown list, if necessary. A date (mm/dd/yyyy) may be entered directly in the New Start Date field. The default is the current date.
If a **New Start Date** is entered that exceeds 9999 days in duration, an error message displays as shown below.

**New duration exceeded 9999 days for Plans Signed activity. Unable to save changes.**

Click the **Save** button to save the change and return to the **Edit Schedule Panel** or click on the **Cancel** button to exit without saving.

For Child Des projects, the Est/Actual Start Date and Start Status for the following activities will be automatically set by the Lead Des and will not be editable: Letting, Contract Award, Final Evaluation.

The Letting predecessor activity for Child Des projects is removed when the project is made a Child Des; if the Child Des is ever made a stand alone project the predecessor activities will need to be re-added manually. See **Maintaining Predecessors** for more information.

**Change the Finish Status**

Click on the Activity’s **Finish Status** link to select a new status.

On the **Change Finish Status** screen, select from the **New Finish Status** dropdown list.
Click the **Save** button to save the change and return to the **Edit Schedule Panel** or click on the **Cancel** button to exit without saving.

For Child Des projects the Finish fields for the following activities will be automatically set by the Lead Des and will not be editable: Contract Award, Final Evaluation. The Letting Finish Date is still editable in the Child Des.

The Letting predecessor activity for Child Des projects is removed when the project is made a Child Des; if the Child Des is ever made a stand alone project the predecessor activities will need to be re-added manually. See [Maintaining Predecessors](#) for more information.

### Change the Estimated/Actual Finish Date

Click on any Activity’s **Estimated/Actual Finish Date** link to display the Change Activity Finish Date screen.

A new date (mm/dd/yyyy) may be entered directly in the **New Finish Date** field for any Activity. Click on the **Calculate** button to update the number of days in both the **New Duration** and **Days Changed from Original** columns and the date in the **New Start Date** column. To calculate multiple date changes at once, enter any number of **New Finish Dates**, and then click on the **Calculate** button.
Click the **Save** button to save the new dates and return to the **Edit Schedule Panel** or click on the **Cancel** button to exit without saving.

If finished editing the Schedule, click on the **Cancel** button to return to the **Project Maintenance Main Page** or another icon in the **Icon Bar** to open a different **Project Maintenance Panel**.

**Adding an Activity**

To add an Activity, click on the **Add New** icon to the right of the **Managing Contact Name** column heading.
In the ADD Screen Mode, enter information as needed. The Duration and minimum and maximum Duration Days are calculated automatically when the Duration value is entered.

To search by contact, click in the Search By Contact radio button. Then, click on the Find icon next to Search Contact to populate the Contact dropdown list with all available contacts or enter part of the Contact’s name in the Search Contact textbox and click on the Find icon to narrow the list. Select the Managing Organization and Managing Contact from their dropdown lists.

To search by organization, click in the Search By Organization radio button. Then, click on the Find icon next to Search Organization to populate the Organization dropdown list with all available contacts or organizations or enter part of the Organization’s name in the Search Organization textbox and click on the Find icon to narrow the list. Select the Managing Organization and Managing Contact from their dropdown lists.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.
Click the Save button to save the new record and return to the Edit Schedule Panel or click on the Cancel button to exit without saving. If saving, click on the OK button at the confirmation message.

New item has been added successfully.
SPMS will not save the record or leave the ADD Screen Mode if a required field is left empty. Instead, a red asterisk (*) will appear to the right of the field and the cursor will blink inside the field.

SPMS does not allow duplicates. If the record already exists in the database, a message displays.

Once saved, the new Activity should be visible in the List.

If finished editing the Schedule, click on the Cancel button to return to the Project Maintenance Main Page or another icon in the Icon Bar to open a different Project Maintenance Panel.

Reassign Template

If a Project Schedule has no completed Activities, a link in the top right corner of the Edit Schedule Panel displays and allows the User to Reassign the Template.
Clicking on the Reassign Template link opens Step 1 of the Authorize Schedule wizard, so the User can select a new template. For details about Authorizing a Schedule, refer to Authorize Schedule in the Project Maintenance section.

To return to the Edit Schedule Panel, click on another icon in the Icon Bar to open a different Project Maintenance Panel.

Changing an Activity's Status

The Status of an Activity determines what changes are allowed. In the example below, Activities may be put on hold or made not-applicable because they are in the Completed or Locked status.
To change an Activity’s status, click on the appropriate icon next to the Activity. A confirmation message displays. Click on the OK button to continue or click on the Cancel button to return to the Edit Schedule Panel without making any changes.

If the OK button is selected, an Activity Log screen opens and requires the User to enter information about the change. Click on the Save button to update the Activity’s status and create the Activity Log entry or click on the Cancel button to return to the Edit Schedule Panel without saving any changes.
If finished editing the Schedule, click on the **Cancel** button to return to the **Project Maintenance Main Page** or another icon in the **Icon Bar** to open a different **Project Maintenance Panel**.

**Maintaining Contacts**

To update Activity’s Managing Organization and Managing Contact information, click on the **Maintain Contact** icon next to that Activity in the **Edit Schedule Panel**.
To search by contact, click in the **Search By Contact** radio button. Then, click on the **Find** 📊 icon next to **Search Contact** to populate the **Contact** dropdown list with all available contacts or enter part of the Contact’s name in the **Search Contact** textbox and click on the **Find** icon to narrow the list. Select the **Managing Organization** and **Managing Contact** from their dropdown lists.

To search by organization, click in the **Search By Organization** radio button. Then, click on the **Find** 📊 icon next to **Search Organization** to populate the **Organization** dropdown list with all available contacts or organizations or enter part of the Organization’s name in the **Search Organization** textbox and click on the **Find** icon to narrow the list. Select the **Managing Organization** and **Managing Contact** from their dropdown lists.
The updated Contact information should be visible list.

If finished editing the Schedule, click on the Cancel button to return to the Project Maintenance Main Page or another icon in the Icon Bar to open a different Project Maintenance Panel.

**Maintaining Predecessors**

To work with an Activity's Predecessors, click on the Maintain Predecessors icon next to that Activity in the Edit Schedule Panel.
The Panel displays a list of available Predecessors and a list of selected Predecessors. Click on the Predecessor in the list to select it and use the double arrow buttons to move it from one list to the other. The **CTRL-click** and **SHIFT-click** shortcut keys may be used to select multiple items.
Click on the **Calculate** button to display the changes made to the Schedule as a result of the Activity’s Predecessor selections.

Click on the **Save** button to save the change and return to the **Edit Schedule Panel**, enter a new date and click on the **Calculate Schedule** button again if changes are necessary, or click on the **Cancel** button to exit without saving.
Then, click on the **Cancel** button to return to the Project Maintenance Main Page or another icon in the **Icon Bar** to open a different Project Maintenance Panel.

### Displaying the Activity Log

Activity Log entries are mandatory for certain actions. If an Activity has Log entries, the link in the Activity Log column displays as “Y”. An “N” link means that there are no existing Log entries.
Adding an Activity Log Entry

To add an entry to the Activity Log, click on the link in the Activity’s Activity Log column.
Then, click on the **Add New** icon to the right of the **Requestor Name** column heading.

**Instructions for common functions such as Viewing Details, Applying Filters, Sorting, Showing More Items per Page, and Exporting to Microsoft Excel may be found in the Getting Started section.**

In the **ADD Screen Mode**, enter information as needed.

Field values that are grayed out are auto-populated, and therefore **NON-EDITABLE**. Fields with a peach background are **REQUIRED**. Fields with no background color are **OPTIONAL**.
Dropdown fields have an auto-complete feature. For example, click on the Log Subject dropdown arrow to the right of the field for a complete list of available Subjects. Typing a letter in the dropdown field navigates to the first value in the list that begins with that letter. For example, typing a “D” displays “Design Approval”.

Click the **Save** button to save the new record and return to the **Activity Log Panel** or click on the **Cancel** button to exit without saving. If saving, click on the **OK** button at the confirmation message.
SPMS will not save the record or leave the **ADD Screen Mode** if a required field is left empty. Instead, a red **asterisk (\*)** will appear to the right of the field. The cursor will blink inside text fields while dropdown fields will be highlighted.

<table>
<thead>
<tr>
<th>Log Subject</th>
<th>*</th>
</tr>
</thead>
</table>

SPMS does not allow duplicates. If the record already exists in the database, a message displays.

![Message](image)

Once saved, the new Entry should be visible in the List. If not, click on any column heading to re-sort and refresh the List. Then, click on the **Cancel** button to return to the **Edit Schedule Panel** or another icon in the **Icon Bar** to open a different **Project Maintenance Panel**.

---

**Editing an Activity Log Entry**

To edit an entry in the Activity Log, click on the link in the Activity's **Activity Log** column.
Then, click on the Edit icon to the right of the Requestor Name column heading.

Instructions for common functions such as Viewing Details, Applying Filters, Sorting, Showing More Items per Page, and Exporting to Microsoft Excel may be found in the Getting Started section.

In the EDIT Screen Mode, update fields as needed.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.
Click the **Save** button to save the record and return to the **Activity Log Panel** or click on the **Cancel** button to exit without saving.

SPMS will not save the record or leave the **EDIT Screen Mode** if a required field is left empty. Instead, a red **asterisk** (*) will appear to the right of the field. The cursor will blink inside text fields while dropdown fields will be highlighted.

The changes should be visible in the List. If not, click on the any column heading to re-sort and refresh the List.

Then, click on the **Cancel** button to return to the **Edit Schedule Panel** or another icon in the **Icon Bar** to open a different **Project Maintenance Panel**.

### Environmental Clearance

A Project’s Environmental Clearances are displayed in the **Environmental Clearance Panel**.

To maintain a Project, access the **Project Maintenance Main Page** by clicking on the **Edit** icon next to the Project’s Des # in the Des Basket or to the right of the Project in the Project Search - Search Results Panel.

**Des Basket**
Access to menu selections, icons and features is dependent on a User’s role and security level. For details, refer to Understanding the Screen in the Getting Started section.

Click on the Environmental Clearance icon or link in the General Maintenance section of the Project Maintenance Main Page or click on the Environmental Clearance icon below the Header on any Project Maintenance Panel.
From the Environmental Clearance Panel, Clearances may be added, edited, or deleted.

Access to menu selections, icons and features is dependent on a User's role and security level. For details, refer to Understanding the Screen in the Getting Started section.
Instructions for common functions such as Viewing Details, Applying Filters, Sorting, Showing More Items per Page, and Exporting to Microsoft Excel may be found in the Getting Started section.

Adding a Clearance

To add a Clearance, click on the Add New icon to the right of the Clearance Date column heading.

In the ADD Screen Mode, enter information as needed.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.

Dropdown fields have an auto-complete feature; for example, click on the Env.Clearance Code dropdown arrow to the right of the field for complete lists of available Codes. Typing a letter in the dropdown field navigates to the first value in the list that begins with that letter. For example, typing an “R” would display “ROD – Record of Decision”.

Env. Clearance Code

ROD - Record of Decision (ES) - 12
CE-1 (C.E, Programmatic) - 7
CE-2 (C.E, State Documentation) - 8
CE-3 (C.E, State Documentation) - 9
CE-4 (FHWA Documentation - 10
FONSI (Finding of No Significant Impact) - 11
ROD - Record of Decision (ES) - 12
State-Funded CE (State Funds Only) - 6
Date fields have two options. A date (mm/dd/yyyy) may be entered directly in the field or the Calendar icon may be used to find a date. Click on the Calendar icon to display the Calendar window.

Then, click on the desired date to populate the field.

Click the Save button to save the new record and return to the Environmental Clearance Panel or click on the Cancel button to exit without saving. If saving, click on the OK button at the confirmation message.

SPMS will not save the record or leave the ADD Screen Mode if a required field is left empty. Instead, a red asterisk (*) will appear to the right of the field and the cursor will blink inside the field.

SPMS does not allow duplicates. If the record already exists in the database, a message displays.
Once saved, the new Clearance should be visible in the List. If not, click on the Clearance Date column heading to re-sort and refresh the List.

Then, click on the Cancel button to return to the Project Maintenance Main Page or another icon in the Icon Bar to open a different Project Maintenance Panel.

**Editing a Clearance**

To edit a Clearance, click on the Edit icon next to the record to be updated.

In the **EDIT Screen Mode**, update fields as needed.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.

SPMS will not save the record or leave the EDIT Screen Mode if a required field is left empty. Instead, a red asterisk (*) will appear to the right of the field and the cursor will blink inside the field.

Click the Save button to save the new record and return to the Environmental Clearance Panel or click on the Cancel button to exit without saving. If saving, click on the OK button at the confirmation message.
The changes should be visible in the List. If not, click on the Clearance Date column heading to re-sort and refresh the List.

Then, click on the Cancel button to return to the Project Maintenance Main Page or another icon in the Icon Bar to open a different Project Maintenance Panel.

Deleting a Clearance

To delete a Clearance, click on the Delete icon next to the record to be removed.

A confirmation message displays. Click on the OK button to confirm the deletion or click on the Cancel button to exit without saving any changes.

The Clearance is removed from the list.

Then, click on the Cancel button to return to the Project Maintenance Main Page or another icon in the Icon Bar to open a different Project Maintenance Panel.

Estimates

Stages visible in the Estimates Panel are determined by the selections in the Valid Phase/Stage List as shown below.
When a Project is proposed, Estimates corresponding to a Phase are entered into the Propose Project – Estimates Panel as shown below.

<table>
<thead>
<tr>
<th>Phase Code</th>
<th>Phase Name</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>PE1</td>
<td>Preliminary Engineering 1</td>
<td>$0.00</td>
</tr>
<tr>
<td>PE2</td>
<td>Preliminary Engineering 2</td>
<td>$0.00</td>
</tr>
<tr>
<td>RW1</td>
<td>Right of Way Purchase</td>
<td>$0.00</td>
</tr>
<tr>
<td>RW2</td>
<td>Right of Way Services</td>
<td>$0.00</td>
</tr>
<tr>
<td>UT1</td>
<td>Utilities PE</td>
<td>$0.00</td>
</tr>
<tr>
<td>UT2</td>
<td>Utilities CN</td>
<td>$0.00</td>
</tr>
<tr>
<td>RR1</td>
<td>Railroad PE</td>
<td>$0.00</td>
</tr>
<tr>
<td>RR2</td>
<td>Railroad CN</td>
<td>$0.00</td>
</tr>
<tr>
<td>CN</td>
<td>Construction</td>
<td>$0.00</td>
</tr>
<tr>
<td>CE</td>
<td>Construction Engineering</td>
<td>$0.00</td>
</tr>
<tr>
<td>RQP</td>
<td>Relinquishment Payment</td>
<td>$0.00</td>
</tr>
<tr>
<td>WEP</td>
<td>WrkZone Patrol &amp; Enforcement</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

While the Project is being proposed, Estimate dollars are considered to be in the Propose Stage. Once the Project is created (proposed), the Propose Stage Estimates are copied to the Initial Stage and the Propose Stage is then locked by SPMS. As work advances, the Project’s schedule is updated and Estimates carry forward to the other Stages (for example, Engineering Assessment, Design or Letting). During this a Stage is locked and the next Stage is unlocked. The Approved Project Allocation Stage is always unlocked and may be edited.

Estimate Dollars in the Final Stage include Purchase Orders and Direct Expenditures from INDOT financial systems.
Entering Estimate Dollar Amounts

To maintain a Project, access the Project Maintenance Main Page by clicking on the Edit icon next to the Project’s Des # in the Des Basket or to the right of the Project record in the Project Search - Search Results Panel.

Des Basket

Project Search - Search Results Panel

Click on the Estimates icon or link in the Cost Maintenance section of the Project Maintenance Main Page or click on the Estimates icon below the Header on any Project Maintenance Panel.
In the **Estimates Panel**, enter dollars in the **Amount** column as needed.

Access to menu selections, icons and features is dependent on a User’s role and security level. For details, refer to [Understanding the Screen](#) in the Getting Started section.
When any Estimate is added or updated, an entry in the Estimate Log is required. To enter or update an Estimate, click on the amount link in the appropriate Phase and Stage column. The Estimate Log Panel opens. Enter the new Estimate amount, Subject, Requestor and any notes in Text.

Click the Save button to save the record and return to the Estimates Panel or click on the Close button return to the Estimates Panel without saving.
Field values that are grayed out are auto-populated, and therefore **NON-EDITABLE**. Fields with a peach background are **REQUIRED**. Fields with no background color are **OPTIONAL**.

SPMS will not save the record or leave the **Estimate Log** screen if a required field is left empty. Instead, a red **asterisk** (\*) will appear to the right of the field and the cursor will blink inside the field.

SPMS automatically checks to make sure the **Amount** entered is within the **Approved Project Allocation Amount**. If not, a reminder message displays as shown below. Click on the **OK** button to return to the **Estimates Panel** and change the **Amount**, if necessary.

```
Message

Some of the project estimates exceeded the approved project allocation.
A message will be sent to program manager detailing these issues.
Your changes have been saved successfully.

OK
```

When finished, click on the **Cancel** button to return to the **Project Maintenance Main Page** or another icon in the **Icon Bar** to open a different **Project Maintenance Panel**.

**Manual Locking, Unlocking, and Locking and Carrying Forward Estimate Dollars (Admins Only)**

The SPMS system automatically Locks, Unlocks, and Locks and Carries Forward Estimate dollars to prevent Users from unintentionally changing historic costs. This results in more accurate reporting beneficial for making informed planning/budget decisions.

Estimate dollars automatically move among Project Stages as the work advances through the Project’s schedule. Stages are automatically locked and other stages are unlocked to allow the user to update estimates. SPMS Administrators may use the Lock/Unlock/Lock and Carry Forward feature to override the schedule and move Estimate dollars manually.

Three icons display at the top of the Estimates Panel and are visible only to SPMS Administrators:

- **Lock Stage**
- **Unlock Stage**
- **Lock Stage / Carry Estimate Forward**
In the example below, the Initial Stage is currently unlocked.

To unlock other Stages, click on the Unlock icon above the Panel. Click in the radio button to the left of the Stage to be unlocked (only one Stage may be unlocked at a time), and click on the Save button. Click on the Cancel button to exit without making any changes.

To lock Stages, click on the Lock icon above the Panel. Click in the radio button to the left of the Stage to be locked (only one Stage may be locked at a time and only those Stages that are currently unlocked appear in the list), and click on the Save button. Click on the Cancel button to exit without making any changes.

To lock Stages and carry estimates forward, click on the Lock and Carry Forward icon above the Panel. Click in the radio button to the left of the Stage to be locked and estimates carried forward (only one Stage may be locked and carried forward at a time and only those Stages that are currently unlocked appear in the list), and click on the Save button. Click on the Cancel button to exit without making any changes.
Lock Stage/Carry forward estimate

[Initial]
[Eng Assessment]

Save  Cancel

When finished, click on the Cancel button to return to the Project Maintenance Main Page or another icon in the Icon Bar to open a different Project Maintenance Panel.

Funding

Project funding information may be updated while maintaining the Project. Access the Project Maintenance Main Page by clicking on the Edit icon next to the Project’s Des # in the Des Basket or to the right of the Project in the Project Search - Search Results Panel.

Des Basket

Des Basket

Clear All

0001250

Project Search - Search Results Panel

Click on the Funding icon or link in the Cost Maintenance section of the Project Maintenance Main Page or click on the Funding icon below the Header on any Project Maintenance Panel.

Access to menu selections, icons and features is dependent on a User’s role and security level. For details, refer to Understanding the Screen in the Getting Started section.
The **Funding Panel** is organized into tabs: Program, Appropriation, Purchase Order and Direct Expenditure. From the Purchase Order and Direct Expenditure tabs, entries are automatically imported from other systems and may only be viewed.

Instructions for common functions such as [Viewing Details](#), [Applying Filters](#), [Sorting](#), [Showing More Items per Page](#), and [Exporting to Microsoft Excel](#) may be found in the Getting Started section.

### Program Tab

A Project’s funding is allocated to a Funding Program by State Fiscal Year for each Phase of the Project. Funding Programs are sorted by State Fiscal Year, Phase and Funding Program.

From the Program tab, Funding Programs may be added, edited or deleted and two reports are available: Funding by Des Report and Funding by Contract Report.
Funding by Des Report

This report displays funding amounts by Phase, State Fiscal Year and Funding Program for the specified DES #.

<table>
<thead>
<tr>
<th>Phase Code</th>
<th>State Fiscal Year</th>
<th>Funding Program</th>
<th>Funding Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Utilities PE (UT1)</td>
<td>2009</td>
<td>Major New - Construction (5016)</td>
<td>$5,000.00</td>
</tr>
<tr>
<td>UT1 Total:</td>
<td></td>
<td></td>
<td>$5,000.00</td>
</tr>
<tr>
<td>Utilities CN (UT2)</td>
<td>2011</td>
<td>Major New - Construction (5016)</td>
<td>$200,000.00</td>
</tr>
<tr>
<td>UT2 Total:</td>
<td></td>
<td></td>
<td>$200,000.00</td>
</tr>
<tr>
<td>Railroad PE (RR1)</td>
<td>2009</td>
<td>Major New - Construction (5016)</td>
<td>$10,000.00</td>
</tr>
<tr>
<td>RR1 Total:</td>
<td></td>
<td></td>
<td>$10,000.00</td>
</tr>
<tr>
<td>Railroad CN (RR2)</td>
<td>2011</td>
<td>Major New - Construction (5016)</td>
<td>$200,000.00</td>
</tr>
<tr>
<td>RR2 Total:</td>
<td></td>
<td></td>
<td>$200,000.00</td>
</tr>
<tr>
<td>Construction (CN)</td>
<td>2011</td>
<td>Major New - Construction (5016)</td>
<td>$2,600,000.00</td>
</tr>
<tr>
<td>CN Total:</td>
<td></td>
<td></td>
<td>$2,600,000.00</td>
</tr>
<tr>
<td>Des Grand Total:</td>
<td></td>
<td></td>
<td>$3,015,000.00</td>
</tr>
</tbody>
</table>
## Funding by Contract Report

This report displays funding amounts by Phase, State Fiscal Year and Funding Program for all Des’s within a Contract. The Contract and Des numbers have been grayed out in the Help Document.

<table>
<thead>
<tr>
<th>Contract #</th>
<th>Des #</th>
<th>Phase Code</th>
<th>State Fiscal Year</th>
<th>Funding Program</th>
<th>Funding Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Utilities PE (UT1)</td>
<td>2009</td>
<td>Major New - Construction (5016)</td>
<td>$5,000.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>UT1 Total:</td>
<td></td>
<td></td>
<td>$5,000.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Utilities CN (UT2)</td>
<td>2011</td>
<td>Major New - Construction (5016)</td>
<td>$200,000.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>UT2 Total:</td>
<td></td>
<td></td>
<td>$200,000.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Railroad PE (RR1)</td>
<td>2009</td>
<td>Major New - Construction (5016)</td>
<td>$10,000.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>RR1 Total:</td>
<td></td>
<td></td>
<td>$10,000.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Railroad CN (RR2)</td>
<td>2011</td>
<td>Major New - Construction (5016)</td>
<td>$200,000.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2012</td>
<td>Major New - Construction (5016)</td>
<td>$50.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>RR2 Total:</td>
<td></td>
<td></td>
<td>$200,000.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Construction (CN)</td>
<td>2011</td>
<td>Major New - Construction (5016)</td>
<td>$2,600,000.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2012</td>
<td>Major New - Construction (5016)</td>
<td>$2,600,000.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>CN Total:</td>
<td></td>
<td></td>
<td>$3,015,000.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Des Total:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Preliminary Engineering 1 (PE1)</td>
<td>2011</td>
<td>Major New - Consulting (5018)</td>
<td>$50,000.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>PE1 Total:</td>
<td></td>
<td></td>
<td>$50,000.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Right of Way Purchase (RW1)</td>
<td>2010</td>
<td>Major New - ROW (5017)</td>
<td>$500,000.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2011</td>
<td>Major New - ROW (5017)</td>
<td>$660,000.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>2012</td>
<td>Major New - ROW (5017)</td>
<td>$330,299.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>RW1 Total:</td>
<td></td>
<td></td>
<td>$1,540,299.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Utilities PE (UT1)</td>
<td>2009</td>
<td>Major New - Construction (5016)</td>
<td>$15,000.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>UT1 Total:</td>
<td></td>
<td></td>
<td>$15,000.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Utilities CN (UT2)</td>
<td>2011</td>
<td>Major New - Construction (5016)</td>
<td>$170,000.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2012</td>
<td>Major New - Construction (5016)</td>
<td>$50.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>UT2 Total:</td>
<td></td>
<td></td>
<td>$170,000.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Railroad PE (RR1)</td>
<td>2009</td>
<td>Major New - Construction (5016)</td>
<td>$10,000.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>RR1 Total:</td>
<td></td>
<td></td>
<td>$10,000.00</td>
</tr>
</tbody>
</table>
### Appropriation Tab

The Funding Amount assigned to a Phase in the Program Tab is further allocated to specific appropriations in the Appropriations Tab. Dollars are assigned priority levels and percentages based on the projects work category, work type, special fund category, route number, transportation system, designed by and program class. Initially, appropriations are added to establish the project number and funding percent.

The generic federal appropriation codes used to establish a project number before actual federal funding is approved are STP, NHS, BRF, CMQ, DMO and FED. The appropriation code and appropriations will change when Federal funds are approved by the Federal Highway Administration.

The state appropriation codes are 906, 783, 803, OCO, TRR7, I69, ORB and the local appropriation code is LPA. The state and local appropriation codes and appropriations will not change.

The appropriations are determined by the Project Accounting Team.

Appropriations are sorted by Phase, State Fiscal Year and Priority.

From the Appropriation tab, appropriation allocations may be added, edited or deleted and two reports are available: Appropriation by Des Report and Appropriation by Contact Report.

---

**Table:**

<table>
<thead>
<tr>
<th>Phase Code</th>
<th>State Fiscal Year</th>
<th>Funding Program</th>
<th>Funding Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Railroad CN (RR2)</td>
<td>2012</td>
<td>Major New - Construction (5016)</td>
<td>$150,000.00</td>
</tr>
<tr>
<td>RR2 Total:</td>
<td></td>
<td></td>
<td>$150,000.00</td>
</tr>
<tr>
<td>Construction (CN)</td>
<td>2011</td>
<td>Major New - Construction (5016)</td>
<td>$27,750,000.00</td>
</tr>
<tr>
<td>CN Total:</td>
<td></td>
<td></td>
<td>$27,750,000.00</td>
</tr>
<tr>
<td>Des Total:</td>
<td></td>
<td></td>
<td>$25,085,299.00</td>
</tr>
<tr>
<td>Construction (CN)</td>
<td>2011</td>
<td>Major New - Construction (5016)</td>
<td>$240,000.00</td>
</tr>
<tr>
<td>CN Total:</td>
<td></td>
<td></td>
<td>$240,000.00</td>
</tr>
<tr>
<td>Des Total:</td>
<td></td>
<td></td>
<td>$240,000.00</td>
</tr>
<tr>
<td>Contract Grand Total</td>
<td></td>
<td></td>
<td>$32,540,299.00</td>
</tr>
</tbody>
</table>

**Phase Totals by Contract**

- Preliminary Engineering (PE1): $50,000.00
- Right of Way Purchase (OW1): $1,540,299.00
- Utilities PE (UT1): $20,000.00
- Utilities CN (UT2): $70,000.00
- Railroad PE (RR1): $20,000.00
- Railroad CN (RR2): $30,000.00
- Construction (CN): $30,590,000.00
Appropriation by DES Report

This report displays appropriation amounts by Phase, State Fiscal Year and Appropriation Code for the specified DES #. The Des #'s has been grayed out in the Help Document.

Appropriation by Contract Report

This report displays appropriation amounts by Phase, State Fiscal Year and Appropriation Code for all Des’s within a Contract. The Contract and Des numbers have been grayed out in the Help Document.
**Purchase Order Tab**

The Purchase Order tab displays all encumbered Purchase Orders associated with the Project. Purchase Orders are sorted by Purchase Order Type, Phase and Fiscal Year.
Information on this tab is automatically imported from other systems and may only be viewed.

**Direct Expenditure Tab**

The Direct Expenditure tab displays all claim voucher payments associated with the Project. Direct Expenditures are sorted by Expenditure Type, Phase and State Fiscal Year.

Information on this tab is automatically imported from other systems and may only be viewed.

**Adding a Project Funding Program**

Click on the Program tab to open the Project Funding Program Panel.
To add a Funding Program, click on the **Add New** icon to the right of the **Funding Amount** column heading.

In the **ADD Screen Mode**, enter information as needed.

Field values that are grayed out are auto-populated, and therefore **NON-EDITABLE**. Fields with a peach background are **REQUIRED**. Fields with no background color are **OPTIONAL**.

If a **Funding Amount** of over $99 million dollars is entered, the amount is saved, but a warning message appears as shown below.
Dropdown fields have an auto-complete feature. For example, click on the Phase dropdown arrow to the right of the field for a complete list of available Phases. Typing a letter in the dropdown field navigates to the first value in the list that begins with that letter. For example, typing an "R" displays “Railroad CN”.

<table>
<thead>
<tr>
<th>Phase</th>
</tr>
</thead>
<tbody>
<tr>
<td>Railroad CN (RR2)</td>
</tr>
<tr>
<td>Construction (CN)</td>
</tr>
<tr>
<td>Construction Engineering (CE)</td>
</tr>
<tr>
<td>Preliminary Engineering 1 (PE1)</td>
</tr>
<tr>
<td>Preliminary Engineering 2 (PE2)</td>
</tr>
<tr>
<td>Railroad PE (RR1)</td>
</tr>
<tr>
<td>Relinquishment Payment (RQP)</td>
</tr>
<tr>
<td>Right of Way Purchase (R/W1)</td>
</tr>
<tr>
<td>Right of Way Services (R/W2)</td>
</tr>
<tr>
<td>Utilities CN (UT2)</td>
</tr>
<tr>
<td>Utilities PE (UT1)</td>
</tr>
<tr>
<td>WtrkZone Patrol &amp; Enforcement (WZP)</td>
</tr>
</tbody>
</table>

Click the **Save** button to save the new record and return to the **Project Funding Program Panel** or click on the **Cancel** button to exit without saving. If saving, click on the **OK** button at the confirmation message. Then, click on the **Cancel** button to return to the **Project Maintenance Main Page**.
SPMS will not save the record or leave the ADD Screen Mode if a required field is left empty. Instead, a red asterisk (*) will appear to the right of the field. The cursor will blink inside text fields while dropdown fields will be highlighted.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.

Once saved, the new Funding Program should be visible in the List. If not, click on any column heading twice to re-sort and refresh the List.

Editing a Project Funding Program

Click on the Program tab to open the Project Funding Program Panel.

To edit a Funding Program, click on the Edit icon next to the record to be updated.

In the EDIT Screen Mode, update fields as needed.

SPMS does not allow duplicates. If the record already exists in the database, a message displays.
If a **Funding Amount** of over $99 million dollars is entered, the amount is saved, but a warning message appears as shown below.

![Warning Message]

Your changes have been saved successfully.

Warning: The Funding Amount entered is greater than $99,999,999. If this is not correct please enter a valid amount.

Click on the **Cancel** button to exit without saving or click on the **Save** button to save the record and return to the **Project Funding Program** Panel. Then, click on the **Cancel** button to return to the **Project Maintenance Main Page**.

SPMS will not save the record or leave the **EDIT Screen Mode** if a required field is left empty. Instead, a red **asterisk** (*) will appear to the right of the field. The cursor will blink inside text fields while dropdown fields will be highlighted.

The changes should be visible in the List. If not, click on the any column heading to re-sort and refresh the List.

### Deleting a Project Funding Program

Click on the **Program** tab to open the **Project Funding Program Panel**.
To delete a Funding Program, click on the Delete icon next to the record to be removed.

A confirmation message displays. Click on the OK button to confirm the change or click on the Cancel button to exit without saving any changes.

The Program is removed from the list.

**Adding an Appropriation Allocation**

Appropriations are sorted by Phase, State Fiscal Year and Priority. State Fiscal Year field defaults to the current State Fiscal Year and may be changed. The first appropriation added requires the Project Number to be entered manually. All subsequent appropriations will populate the Project Number field with the value entered from the first appropriation and may be changed.

Click on the Appropriation tab to open the Appropriation Allocation Panel.

To add an Appropriation Allocation, click on the Add New icon to the right of the Amount column heading.
In the **ADD Screen Mode**, enter information as needed.

Field values that are grayed out are auto-populated, and therefore **NON-EDITABLE**. Fields with a peach background are **REQUIRED**. Fields with no background color are **OPTIONAL**.

*This color background fields are mandatory*
Dropdown fields have an auto-complete feature. For example, click on the Phase dropdown arrow to the right of the field for a complete list of available Phases. Typing a letter in the dropdown field navigates to the first value in the list that begins with that letter. For example, typing an "R" displays "Railroad CN".

<table>
<thead>
<tr>
<th>Phase</th>
</tr>
</thead>
<tbody>
<tr>
<td>Railroad CN (RR2)</td>
</tr>
<tr>
<td>Construction (CN)</td>
</tr>
<tr>
<td>Construction Engineering (CE)</td>
</tr>
<tr>
<td>Preliminary Engineering 1 (PE1)</td>
</tr>
<tr>
<td>Preliminary Engineering 2 (PE2)</td>
</tr>
<tr>
<td>Railroad CN (RR2)</td>
</tr>
<tr>
<td>Railroad PE (RR1)</td>
</tr>
<tr>
<td>Relinquishment Payment (RQP)</td>
</tr>
<tr>
<td>Right of Way Purchase (RW1)</td>
</tr>
<tr>
<td>Right of Way Services (RW2)</td>
</tr>
<tr>
<td>Utilities CN (UT2)</td>
</tr>
<tr>
<td>Utilities PE (UT1)</td>
</tr>
<tr>
<td>WkrZone Patrol &amp; Enforcement (WZP)</td>
</tr>
</tbody>
</table>

Click the **Save** button to save the new record and return to the **Appropriation Allocation Panel** or click on the **Cancel** button to exit without saving. If saving, click on the **OK** button at the confirmation message. Then, click on the **Cancel** button to return to the **Project Maintenance Main Page**.

![Message](image)
SPMS will not save the record or leave the **ADD Screen Mode** if a required field is left empty. Instead, a red *asterisk* (*) will appear to the right of the field. The cursor will blink inside text fields while dropdown fields will be highlighted.

```
<table>
<thead>
<tr>
<th>Priority</th>
</tr>
</thead>
<tbody>
<tr>
<td>*</td>
</tr>
</tbody>
</table>
```

SPMS does not allow duplicates. If the record already exists in the database, a message displays.

```
Message

![Record already exists]

OK
```

Once saved, the new Allocation should be visible in the List. If not, click on any column heading twice to re-sort and refresh the List.

**Editing an Appropriation Allocation**

Click on the **Appropriation** tab to open the **Appropriation Allocation Panel**.

To edit an Appropriation Allocation, click on the **Edit** icon next to the record to be updated.

In the **EDIT Screen Mode**, update fields as needed.

Field values that are grayed out are auto-populated, and therefore **NON-EDITABLE**. Fields with a peach background are **REQUIRED**. Fields with no background color are **OPTIONAL**.
Click the Save button to save the record and return to the Appropriation Allocation Panel or click on the Cancel button to exit without saving. Then, click on the Cancel button to return to the Project Maintenance Main Page.

SPMS will not save the record or leave the EDIT Screen Mode if a required field is left empty. Instead, a red asterisk (*) will appear to the right of the field. The cursor will blink inside text fields while dropdown fields will be highlighted.

The changes should be visible in the List. If not, click on the any column heading to re-sort and refresh the List.

**Deleting an Appropriation Allocation**

Click on the Appropriation tab to open the Appropriation Allocation Panel.

To delete an Appropriation Allocation, click on the Delete icon next to the record to be removed.

A confirmation message displays. Click on the OK button to confirm the change or click on the Cancel button to exit without saving any changes.
The Allocation is removed from the list.

**Viewing a Purchase Order**

Click on the **Purchase Order** tab to open the **Purchase Order Panel**.

Information may only be viewed, sorted or exported to Excel. By default, Purchase Order information is sorted by Phase and PO Date from oldest to newest date sequence.

Instructions for common functions such as **Viewing Details**, **Applying Filters**, **Sorting**, **Showing More Items per Page**, and **Exporting to Microsoft Excel** may be found in the **Getting Started** section.

Field values that are grayed out are auto-populated, and therefore **NON-EDITABLE**. Fields with a peach background are **REQUIRED**. Fields with no background color are **OPTIONAL**.

Click on the **Cancel** button to return to the **Project Maintenance Main Page** or another icon in the **Icon Bar** to open a different **Project Maintenance Panel**.
Viewing a Direct Expenditure

Click on the Direct Expenditure tab to open the Direct Expenditure Panel.

Information may only be viewed, sorted or exported to Excel. By default Direct Expenditure information is sorted by Phase and Expenditure Date from newest to oldest date sequence.

Instructions for common functions such as Viewing Details, Applying Filters, Sorting, Showing More Items per Page, and Exporting to Microsoft Excel may be found in the Getting Started section.

Click on the Cancel button to return to the Project Maintenance Main Page or another icon in the Icon Bar to open a different Project Maintenance Panel.

General Maintenance

To maintain a Project, access the Project Maintenance Main Page by clicking on the Edit icon next to the Project’s Des # in the Des Basket or to the right of the Project in the Project Search - Search Results Panel.

Des Basket
Project Search - Search Results Panel

Access to menu selections, icons and features is dependent on a User's role and security level. For details, refer to Understanding the Screen in the Getting Started section.

Click on the General Information icon in the General Maintenance section of the Project Maintenance Main Page or click on the General Information icon below the Header on any Project Maintenance Panel.
In the **General Information Panel**, update information as needed. Keep in mind that the values in the **Designed By** dropdown list are the localities in which the User has authority to propose a Project. This is based on the User’s security profile.

The **Work Category and Work Type** dropdown lists are populated with valid choices based on the **Designed By** selection.

**Location** information is limited to 80 characters and should be specific and not information that is already mentioned in other fields. For example, the road number and city are already provided and should not be mentioned in the **Location**. Examples of acceptable **Location** entries are:

<table>
<thead>
<tr>
<th>Location Type</th>
<th>Location Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Road</td>
<td>FROM 1.40 miles W of SR5 TO 2.50 miles W of SR5</td>
</tr>
<tr>
<td>Bridge</td>
<td>Bridge OVER No Named Creek, 1.35 miles N of SR14</td>
</tr>
</tbody>
</table>
Single Point | AT Main Street in TOWN
Small Structure | OVER Tippy Ditch, 3.5 miles S of SR124

Update optional fields as needed.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.

If a numeric code displays instead of actual words in any field, it indicates that the value is historical (no longer active). For example, if “0001233” displays instead of “New Road Construction” in the Work Type field, it means that Work Type = New Road Construction is historical.
SPMS will not save the record or leave the General Information Panel if a required field is left empty. Instead, a red asterisk (*) will appear to the right of the field and the cursor will blink inside the field.

Click the **Save** button to save the updates or click on the **Cancel** button to exit without saving. If saving, click on the **OK** button at the confirmation message.

Then, click on the **Cancel** button to return to the Project Maintenance Main Page or another icon in the Icon Bar to open a different Project Maintenance Panel.
Permit

From the Permits Panel, a Project's Permits and Rule 5 Permit (a performance-based regulation designed to reduce pollutants that are associated with construction and/or land disturbing activities) may be added, edited, or deleted.

To maintain a Project, access the Project Maintenance Main Page by clicking on the Edit icon next to the Project's Des # in the Des Basket or to the right of the Project in the Project Search - Search Results Panel.

Des Basket

Project Search - Search Results Panel

Access to menu selections, icons and features is dependent on a User's role and security level. For details, refer to Understanding the Screen in the Getting Started section.

Click on the Permits icon or link in the General Maintenance section of the Project Maintenance Main Page or click on the Permits icon below the Header on any Project Maintenance Panel.
Permit Tab

<table>
<thead>
<tr>
<th>Agency ID</th>
<th>Permit Type</th>
<th>Reviewer Name</th>
<th>Approved</th>
<th>Expires</th>
<th>Extension</th>
</tr>
</thead>
<tbody>
<tr>
<td>Corps of Engineers Lexow</td>
<td>404 Clean Water Act</td>
<td>Save, Nathan (10000242081)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Rule5 Tab
Instructions for common functions such as Viewing Details, Applying Filters, Sorting, Showing More Items per Page, and Exporting to Microsoft Excel may be found in the Getting Started section.

Adding a Permit

To add a Permit, click on the Add New icon to the right of the Reviewer Name column heading.

In the ADD Screen Mode, enter information as needed. The dropdown lists do not have to be selected in order.

The Approved Date cannot be later than the Expires Date. A warning message displays. Click on the OK button and correct before saving.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.
Dropdown fields have an auto-complete feature. For example, click on the Permit Type dropdown arrow to the right of the field for a complete list of available Types. Typing a number in the dropdown field navigates to the first value in the list that begins with that number. For example, typing an “R” displays “Road Crossing - 14”.

Date fields have two options. A date (mm/dd/yyyy) may be entered directly in the field or the Calendar icon may be used to find a date. Click on the Calendar icon to display the Calendar window.
Then, click on the desired date to populate the field.

Click the **Save** button to save the new record and return to the **Permits Panel** or click on the **Cancel** button to exit without saving. If saving, click on the **OK** button at the confirmation message. Then, click on the **Cancel** button to return to the **Project Maintenance Main Page**.

**Message**

- **New item has been added successfully.**

SPMS will not save the record or leave the **ADD Screen Mode** if a required field is left empty. Instead, a red **asterisk** (*) will appear to the right of the field. The cursor will blink inside text fields while dropdown fields will be highlighted.

**Permit Type**

- **Record already exists**

Once saved, the new Permit should be visible in the List. If not, click on any column heading twice to re-sort and refresh the List.
**Editing a Permit**

To edit a Permit, click on the **Edit** icon next to the record to be updated.

In the **EDIT Screen Mode**, update fields as needed.

Field values that are grayed out are auto-populated, and therefore **NON-EDITABLE**. Fields with a peach background are **REQUIRED**. Fields with no background color are **OPTIONAL**.

Click the **Save** button to save the record and return to the **Permits Panel** or click on the **Cancel** button to exit without saving. Then, click on the **Cancel** button to return to the **Project Maintenance Main Page**.

**Deleting a Permit**

To delete a Permit, click on the **Delete** icon next to the record to be removed.
A confirmation message displays. Click on the **OK** button to confirm the deletion or click on the **Cancel** button to exit without saving any changes.

![Message from webpage]

The Permit is removed from the list.

**Adding a Rule 5 Permit**

To add a Rule 5 Permit, click on the **Add New** icon to the right of the **Notice of Intent** column heading.

In the **ADD Screen Mode**, enter information as needed. The dropdown lists do not have to be selected in order.

When a Project is being proposed, the affected counties are entered into SPMS. Notices of Intent are filed with the county offices requiring Rule 5 Permits. Therefore, multiple Rule 5 Permits may be entered in this Panel – one for each county. In the **Add Screen Mode Panel** shown below, the available counties that appear in the County dropdown list are Marion, Hancock, Wayne and Hendricks.

![Add Screen Mode Panel]

As the counties are added, they are removed from the County dropdown list. In the example below, a Rule 5 Permit has been added for Marion County and is displayed in the **Rule5 Panel**. In the **Add Screen Mode Panel**, Marion has been removed from the dropdown list.
Field values that are grayed out are auto-populated, and therefore **NON-EDITABLE**. Fields with a peach background are **REQUIRED**. Fields with no background color are **OPTIONAL**.

Dropdown fields have an auto-complete feature. For example, click on the Reviewer dropdown arrow to the right of the field for a complete list of available Reviewers. Typing a letter in the dropdown field navigates to the first value in the list that begins with that letter. For example, typing an “S” displays “Saxe, Nathan”.
Date fields have two options. A date (mm/dd/yyyy) may be entered directly in the field or the Calendar icon may be used to find a date. Click on the Calendar icon to display the Calendar window. Then, click on the desired date to populate the field.

Click the Save button to save the new record and return to the Rule 5 Permits Panel or click on the Cancel button to exit without saving. If saving, click on the OK button at the confirmation message. Then, click on the Cancel button to return to the Project Maintenance Main Page.
SPMS will not save the record or leave the ADD Screen Mode if a required field is left empty. Instead, a red asterisk (*) will appear to the right of the field. The cursor will blink inside text fields while dropdown fields will be highlighted.

SPMS does not allow duplicates. If the record already exists in the database, a message displays.

Once saved, the new Rule 5 Permit should be visible in the List. If not, click on any column heading twice to re-sort and refresh the List.

**Editing a Rule 5 Permit**

To edit a Rule 5 Permit, click on the Edit icon next to the record to be updated.

In the EDIT Screen Mode, update fields as needed.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.
Click the Save button to save the record and return to the Rule 5 Panel or click on the Cancel button to exit without saving. Then, click on the Cancel button to return to the Project Maintenance Main Page.

SPMS will not save the record or leave the EDIT Screen Mode if a required field is left empty. Instead, a red asterisk (*) will appear to the right of the field. The cursor will blink inside text fields while dropdown fields will be highlighted.

The changes should be visible in the List. If not, click on the any column heading to re-sort and refresh the List.

Deleting a Rule 5 Permit

To delete a Rule 5 Permit, click on the Delete icon next to the record to be removed.

A confirmation message displays. Click on the OK button to confirm the deletion or click on the Cancel button to exit without saving any changes.

The Rule 5 Permit is removed from the list.

Project Log

From the Project Log Panel, Project Log Entries may be added or edited (only SPMS Administrators have edit permissions).
Project Log entries are mandatory for certain actions. For example, an entry is required when a Project's status is changed in the **Project Log - Project Maintenance Panel**. The Panel opens and requires the User to enter information about the change. Clicking on the **Save** button updates the Project's status and creates a Project Log entry.

![Make Project Provisional](image)

Project Log entries may be viewed or manually added by maintaining the Project.

To maintain a Project, access the **Project Maintenance Main Page** by clicking on the **Edit** icon next to the Project's Des # in the Des Basket or to the right of the Project in the Project Search - Search Results Panel.

**Des Basket**

![Des Basket](image)

**Project Search - Search Results Panel**
Access to menu selections, icons and features is dependent on a User's role and security level. For details, refer to Understanding the Screen in the Getting Started section.

Click on the Project Log icon or link in the General Maintenance section of the Project Maintenance Main Page or click on the Project Logs icon below the Header on any Project Maintenance Panel.
Adding a Project Log Entry

To add a Project Log Entry, click on the **Add New** icon to the right of the **Requestor Name** column heading.

Instructions for common functions such as **Viewing Details**, **Applying Filters**, **Sorting**, **Showing More Items per Page**, and **Exporting to Microsoft Excel** may be found in the **Getting Started** section.

In the **ADD Screen Mode**, enter information as needed.

Field values that are grayed out are auto-populated, and therefore **NON-EDITABLE**. Fields with a peach background are **REQUIRED**. Fields with no background color are **OPTIONAL**.
Dropdown fields have an auto-complete feature. For example, click on the Log Subject dropdown arrow to the right of the field for a complete list of available Subjects. Typing a letter in the dropdown field navigates to the first value in the list that begins with that letter. For example, typing a “D” displays “Design Approval”.
Click the **Save** button to save the new record and return to the **Project Log Panel** or click on the **Cancel** button to exit without saving. If saving, click on the **OK** button at the confirmation message.
SPMS will not save the record or leave the **ADD Screen Mode** if a required field is left empty. Instead, a red asterisk (*) will appear to the right of the field. The cursor will blink inside text fields while dropdown fields will be highlighted.

<table>
<thead>
<tr>
<th>Log Subject</th>
</tr>
</thead>
</table>

SPMS does not allow duplicates. If the record already exists in the database, a message displays.

![Message](Record_already_exists)

Once saved, the new Entry should be visible in the List. If not, click on any column heading to re-sort and refresh the List.

Then, click on the **Cancel** button to return to the **Project Maintenance Main Page** or another icon in the **Icon Bar** to open a different **Project Maintenance Panel**.

**Editing a Project Log Entry (Admins ONLY)**

To edit a Project Log Entry, click on the **Edit** icon next to the record to be updated.
Instructions for common functions such as Viewing Details, Applying Filters, Sorting, Showing More Items per Page, and Exporting to Microsoft Excel may be found in the Getting Started section.

In the EDIT Screen Mode, update fields as needed.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.
Click the **Save** button to save the record and return to the **Project Log Panel** or click on the **Cancel** button to exit without saving.

SPMS will not save the record or leave the **EDIT Screen Mode** if a required field is left empty. Instead, a red **asterisk (**) will appear to the right of the field. The cursor will blink inside text fields while dropdown fields will be highlighted.

The changes should be visible in the List. If not, click on the any column heading to re-sort and refresh the List.

Then, click on the **Cancel** button to return to the **Project Maintenance Main Page** or another icon in the **Icon Bar** to open a different **Project Maintenance Panel**.

**Rail Crossings**

A Project may include one or more **Railroad Crossings**. The activities of the railroad companies that own the crossings need to be coordinated, and the status of each crossing needs to be tracked. For every **Railroad Crossing** added to the Project, a Railroad Coordination Activity is automatically added to the Project schedule, with the railroad company name and AAR number.

To maintain a Project, access the **Project Maintenance Main Page** by clicking on the Edit icon next to the Project’s Des # in the Des Basket or to the right of the Project in the Project Search - Search Results Panel.

**Des Basket**

**Project Search - Search Results Panel**
Access to menu selections, icons and features is dependent on a User’s role and security level. For details, refer to Understanding the Screen in the Getting Started section.

Click on the Rail Crossings icon or link in the General Maintenance section of the Project Maintenance Main Page or Click on the Rail Crossings icon below the Header on any Project Maintenance Panel.

A Railroad Coordination Activity Type is required in the schedule to access the Rail Crossings Panel. If the Activity Type is not found, a message displays when the mouse hovers over the icon.
If all Railroad Coordination Activities have been completed for the Project, Rail Crossings may not be added or deleted. The Panel may or may not display information, depending on whether Railroad Company information was added to the Project prior to the Activity being completed. A message displays directly below the Rail Crossings Panel’s title bar explaining that no additional information may be added or deleted.

Rail Crossings involved in a Project are displayed in the Rail Crossings Panel. From this Panel, Rail Crossings may be added or deleted.

No Rail Crossing data were entered for this Project

All Railroad Activities are completed. Adding and/or deleting Rail Crossing data is not allowed.

Instructions for common functions such as Viewing Details, Applying Filters, Sorting, Showing More Items per Page, and Exporting to Microsoft Excel may be found in the Getting Started section.

Adding a Rail Crossing

To add a Rail Crossing, click on the Add New icon to the right of the AAR column heading.
In the ADD Screen Mode, select the Railroad Company from the dropdown list. Then, select the AAR assigned to that company from the AAR dropdown list.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.

Dropdown fields have an auto-complete feature. For example, click on the Railroad Company dropdown arrow to the right of the field for a complete list of available Companies. Typing a letter in the dropdown field navigates to the first value in the list that begins with that letter. For example, typing an “E” displays “Elgin, Joliet & Eastern Railway”.

Click the Save button to save the new record and return to the Rail Crossing Panel or click on the Cancel button to exit without saving. If saving, click on the OK button at the confirmation message. Then, click on the Cancel button to return to the Project Maintenance Main Page.
SPMS will not save the record or leave the **ADD Screen Mode** if a required field is left empty. Instead, a red **asterisk (**) will appear to the right of the field. The cursor will blink inside text fields while dropdown fields will be highlighted.

SPMS does not allow duplicates. If the record already exists in the database, a message displays.

Once saved, the new Rail Crossing should be visible in the List. If not, click on any column heading twice to re-sort and refresh the List.

Then, click on the **Cancel** button to return to the **Project Maintenance Main Page** or another icon in the **Icon Bar** to open a different **Project Maintenance Panel**.

**Deleting a Rail Crossing**

To delete a Rail Crossing, click on the **Delete** icon next to the record to be removed.

A confirmation message displays. Click on the **OK** button to confirm the deletion or click on the **Cancel** button to exit without saving any changes.
The Rail Crossing is removed from the list.

**Routes & Project Length**

A Project’s Route, Reference Post, Traffic and Length (in kilometers and miles) are displayed in the Routes and Project Length Panel.

**Refreshing a Corporate Route and Project Length**

To maintain a Project, access the Project Maintenance Main Page by clicking on the Edit icon next to the Project’s Des # in the Des Basket or to the right of the Project in the Project Search - Search Results Panel.

**Des Basket**

Access to menu selections, icons and features is dependent on a User’s role and security level. For details, refer to Understanding the Screen in the Getting Started section.

Route and Project Length data for Corporate Route Projects are imported from official Source databases and are not editable. The only way to update (refresh) Route and Project Length information for a Corporate Route Project is to click the Refresh icon to the right of the link on the Project Maintenance Main Page.
To update a Corporate Route Project, the Project's status must not be Historical, Eliminated, or Archived.

If Bridges, Permits and/or Signals data exist for this Project, the following message displays. Click on the OK button to confirm.
The **Refresh A Project Panel** displays, but the **Start** button is disabled. The associated data must be removed before Route and Project Length information may be updated.

![Refresh A Project Panel](image)

When associated Bridge, Permit or Signal data have been removed, click on the **Refresh** icon to the right of the link on the **Project Maintenance Main Page** again and update information as needed in the **Refresh A Project Panel**.

![Refresh A Project Panel](image)

Click on the **Start** button to continue or click on the **Cancel** button to exit without saving and return to the **Project Maintenance Main Page**.

If **Start** is selected, the **Refresh a Project (Details) Panel** displays the refreshed (updated) Route and Reference Post information as shown below.
The data in this Panel are determined by the route and reference post information entered in the **Routes Panel**.

Some fields are populated from data mapping between the Source and SPMS systems. If the information maps correctly for these fields, a green checkmark ✓ appears next to the field, and the Source and SPMS values display in side-by-side-columns.

Other fields are populated from calculations based on the route and reference post information entered on the **Routes Panel**. If values could be determined, a green checkmark ✓ appears next to each field.

Information on this Panel is editable ONLY for SPMS Administrators. Therefore, it is **CRITICAL** to check every field for accuracy as it cannot be edited even when maintaining the Project.
A red triangle ▲ appears next to any field that needs attention. It is possible that the road and reference post information was entered incorrectly. If so, click on the Previous button to return to the Refresh a Project Panel and correct any data entry errors.

However, if the errors indicated with a red triangle ▲ are due to data not mapping correctly or data not found, an SPMS Administrator must be notified to correct the problem. Click on the Email SPMS Support icon in the title bar for assistance.

Until all required fields are reflected correctly (indicated by the green checkmark ✔), no further work may be done. Click on the Previous button to enter route and reference post information again or click on the Cancel button to exit without saving and return to the Project Maintenance Main Page.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Route</td>
<td>SR-135</td>
</tr>
<tr>
<td>Ref Post From</td>
<td>127 + 2</td>
</tr>
<tr>
<td>Ref Post To</td>
<td>130 + 8</td>
</tr>
</tbody>
</table>

![Refresh A Project](image)

When all required information on this Panel is complete and accurate, click the Update button to continue. A confirmation message displays. Click on the OK button to confirm the refresh and then click on the Finish button to return to the General Information Panel.
Display Only
To simply display the Route and Project Length information, click on the Routes & Project Length icon or link in the General Maintenance section of the Project Maintenance Main Page or click on the Routes & Project Length icon below the Header on any Project Maintenance Panel.

The Route and Project Length tabs display, but information is non-editable.

Route Tab

Project Length Tab
Click on the **Cancel** button to return to the **Project Maintenance Main Page**.

**Changing a Special Route and Project Length**

To maintain a Project, access the **Project Maintenance Main Page** by clicking on the **Edit** icon next to the Project's Des # in the Des Basket or to the right of the Project in the Project Search - Search Results Panel.

**Des Basket**

Access to menu selections, icons and features is dependent on a User's role and security level. For details, refer to **Understanding the Screen** in the Getting Started section.

**Project Search - Search Results Panel**

Click on the **Routes & Project Length** icon or link in the **General Maintenance** section of the **Project Maintenance Main Page** or click on the **Routes & Project Length** icon below the Header on any **Project Maintenance Panel**.
Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.

To update a Special Route Project, the Project’s status must not be Historical, Eliminated, or Archived.

The Project’s Route and Reference information displays on the Route tab. Click on the Change Route button to update the Project’s Route information.
If Bridges, Permits and/or Signals data exist for this Project, the following message displays. Click on the **Yes** button to continue updating the Route information in the same primary county or click on the **No** button to either remove associated Bridge, Permit or Signal data or change the Project's primary county, as needed, before work can continue on the Route and Project Length tabs.

If Bridges, Permits and/or Signals data exist for this Project, the following message displays. Click on the **Yes** button to continue updating the Route information in the same primary county or click on the **No** button to either remove associated Bridge, Permit or Signal data or change the Project's primary county, as needed, before work can continue on the Route and Project Length tabs.

It is also possible to receive the following message. Click on the **Yes** button to continue updating the Route information and keep the data on the Project Length tab. After selecting a new Route, click on the Project Length tab and update the length to reflect the new Route. Click on the **No** button to select a
Route from a different county and remove the data from the Project Length tab. After selecting a new Route, click on the Project Length tab and enter the length for the new Route.

If **Yes** is selected, two tabs display, **Select Existing Route**, which is used to add a route that already exists and **Add & Select New Route**, which is used to create a new route and select it for this project.

1) **Select Existing Route**

Click on the **Select Existing Route** tab heading. Select the **Route Type** and/or **County** from the dropdown list to return all existing routes of that type within the counties involved in the Project. Click on the green checkmark  ✓  to select the desired route from the list.

To filter the list, type the name of the route (or any part of the name) into the **Route Name** text box and click on the **Apply Filter**  📯  icon.

SPMS populates the data on the **Route Tab**.
Update the Reference Post and Traffic information as needed. Click on the **Project Length Tab** and enter the length for the Project.

AKA Route may be added if needed (Refer to Adding an AKA Route).

Click the **Save** button to save the changes or click on the **Cancel** button to exit back to the Project Maintenance Main Page.

2) **Add and Select New Route**

Click on the **Add and Select New Route** tab heading. In the **Add Screen Mode**, select the **Route Type** and **County** from the dropdown lists. Only routes in the primary county are available in the dropdown list. When the **Add** button is clicked, the **Route Number** is automatically generated for **County Roads** and **City Streets**. For **Various Route Types**, a Route Number of **VARI** is automatically generated.
Click on the **Add** button to save the route. SPMS populates the route information on the main **Route Tab**.

Update the Reference Post and Traffic information as needed. Click on the **Project Length Tab** and enter the length for the Project.

AKA Route may be added if needed (Refer to [Adding an AKA Route](#)).

Click the **Save** button to save the changes or click on the **Cancel** button to exit back to the **Project Maintenance Main Page**.

**Project Length Panel**

The Project Length Panel displays the length for each County affected by the Project in miles and kilometers. Lengths may be added, edited, or deleted. **It is important to know that no Delete icon appears next to the County that the Project starts in, because this is considered the primary county and must not be deleted.** In the example below, the Project begins in Marion County, which cannot be deleted as a Delete icon does not appear.

<table>
<thead>
<tr>
<th>County Code</th>
<th>County Name</th>
<th>Kilometers</th>
<th>Miles</th>
</tr>
</thead>
<tbody>
<tr>
<td>99</td>
<td>Various</td>
<td>0.000</td>
<td>0.000</td>
</tr>
</tbody>
</table>

Click the **Save** button to save the changes or click on the **Cancel** button to exit back to the **Project Maintenance Main Page**.
Field values that are grayed out are auto-populated, and therefore **NON-EDITABLE**. Fields with a peach background are **REQUIRED**. Fields with no background color are **OPTIONAL**.

In the **Project Length Panel**, click on the **Add New** icon to the right of the **Miles** column heading to add an additional **County** and **Length**.

In the **ADD Screen Mode**, select the **County** from the dropdown list (the list is determined by the route and reference post information) and enter the kilometers or miles in the text box. If one unit of measurement is entered, the other is calculated by SPMS. For example, type the number of miles into the **Miles** text box and hit the Tab key to move the cursor from the field. The number of kilometers appears in the **Kilometers** text box.

In the **EDIT Screen Mode**, update the miles and kilometers fields as needed. The County may not be edited.

SPMS will not save the record or leave the **ADD Screen Mode** if the required fields are empty. Instead, a red **asterisk** (*) will appear to the right of the field and the cursor will blink inside the field.

Once a **County Project Length** is added to the List, it can be edited or deleted.

To edit a County’s Project Length, click on the **Edit** icon next to the record to be updated.

Instructions for common functions such as **Viewing Details**, **Applying Filters**, **Sorting**, **Showing More Items per Page**, and **Exporting to Microsoft Excel** may be found in the Getting Started section.

In the **EDIT Screen Mode**, update the miles and kilometers fields as needed. The County may not be edited.
Click on the **Update** button to save the record and return to the **Project Length Panel** or click on the **Cancel** button to exit without saving. If saving, the new **Project Length** should be visible in the list.

SPMS will not save the record or leave the **EDIT Screen Mode** if no number is entered in the Kilometers or Miles field. Click on the **OK** button in the message window and complete these fields.

To delete a **Project Length**, click on the **Delete** icon next to the record to be removed. It is important to know that no **Delete** icon appears next to the County that the Project starts in, because this is considered the primary county and must not be deleted.

A confirmation message displays. Click on the **OK** button to confirm the deletion or click on the **Cancel** button to exit without saving any changes.
The Project Length is removed from the list.

When finished, click on the **Save** button to save the changed route or click on the **Cancel** button to return to the **Project Maintenance Main Page** without saving the changes.

### Adding an AKA Route

A Route may be known by multiple names. For example, County Road 900 South may also be known as South Fork Road. In these cases, it may be important to add an **AKA** (“also known as”) Route to the Project.

To add an AKA Route, click on the **Add New** icon to the right of the **Route Name** column heading to add an **AKA Route**.

The AKA Route Panel opens with two tabs, one to be used to add a route that already exists and one to be used to create a new route and select it for this project.

Field values that are grayed out are auto-populated, and therefore **NON-EDITABLE**, Fields with a peach background are **REQUIRED**, Fields with no background color are **OPTIONAL**.
1) Select Existing Route

Click on the **Select Existing Route** tab heading. Select the **Route Type** and/or **County** from the dropdown list to return all existing routes of that type within the counties involved in the Project. Click on the green checkmark to select the desired route from the list.

To filter the list, type the name of the route (or any part of the name) into the **Route Name** text box and click on the **Apply Filter** icon.

![Select Existing Route Table]

SPMS populates the route information on the main **AKA Route Panel**.

2) Add and Select New Route

Click on the **Add and Select New Route** tab heading. In the **Add Screen Mode**, select the **Route Type** and **County** from the dropdown lists. When the **Add** button is clicked, the **Route Number** is automatically generated for **County Roads** and **City Streets**. For **Various Route Types**, a Route Number of **VARI** is automatically generated.
Click on the Add button to save the route to the Special Route List. SPMS populates the route information on the main AKA Route Panel.

When finished, click on the Save button to save the AKA route or click on the Cancel button to return to the Project Maintenance Main Page without saving the changes.

**Signals**

If traffic signals must be installed as part of a Project, the Signals Required field on the Project Maintenance - General Information Panel must be set to Yes before adding them here in the Signals Panel.

To maintain a Project, access the Project Maintenance Main Page by clicking on the Edit icon next to the Project’s Des # in the Des Basket or to the right of the Project in the Project Search - Search Results Panel.
Access to menu selections, icons and features is dependent on a User’s role and security level. For details, refer to Understanding the Screen in the Getting Started section.

Click on the **Signals** icon or link ![Signals](image) in the **General Maintenance** section of the **Project Maintenance Main Page** or click on the **Signals** ![Signals](image) icon below the Header on any **Project Maintenance Panel**.
Remember that the **Signals Required** field must be set to **YES** to access the **Signals Panel**. If it is not set to **Yes**, a message displays when the mouse hovers over the icon on the icon bar. In the General Maintenance section, this message displays when the mouse hovers over the icon and the Signals link is grayed out.

### Icon Bar

![Signals required flag is not set for this project.](image)

### General Maintenance Section

![General Maintenance Section](image)

From the **Signals Panel**, Signals may be added or deleted.

Access to menu selections, icons and features is dependent on a User’s role and security level. For details, refer to **Understanding the Screen** in the Getting Started section.

![Signals](image)

Instructions for common functions such as **Viewing Details**, **Applying Filters**, **Sorting**, **Showing More Items per Page**, and **Exporting to Microsoft Excel** may be found in the Getting Started section.

### Adding a Signal

To add a Signal, click on the **Add New** icon to the right of the **Signal Number** column heading.

In the **ADD Screen Mode**, enter information as needed.
Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.

<table>
<thead>
<tr>
<th>Field</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Signal Type</td>
<td></td>
</tr>
<tr>
<td>County</td>
<td></td>
</tr>
<tr>
<td>Signal Number</td>
<td></td>
</tr>
</tbody>
</table>

Click the **Save** button to save the new record and return to the **Signals Panel** or click on the **Cancel** button to exit without saving. If saving, click on the **OK** button at the confirmation message.

![New item has been added successfully.](image)
SPMS will not save the record or leave the **ADD Screen Mode** if a required field is left empty. Instead, a red *asterisk* (*) will appear to the right of the field. The cursor will blink inside text fields while dropdown fields will be highlighted.

SPMS does not allow duplicates. If the record already exists in the database, a message displays.

Once saved, the new Signal should be visible in the List. If not, click on the **Signal Number** column heading to re-sort and refresh the List.

Then, click on the **Cancel** button to return to the **Project Maintenance Main Page** or another icon in the **Icon Bar** to open a different **Project Maintenance Panel**.

### Deleting a Signal

To delete a Signal, click on the **Delete** icon next to the record to be removed.

A confirmation message displays. Click on the **OK** button to confirm the deletion or click on the **Cancel** button to exit without saving any changes.

The Signal is removed from the list.

Then, click on the **Cancel** button to return to the **Project Maintenance Main Page** or another icon in the **Icon Bar** to open a different **Project Maintenance Panel**.
Utilities

A Project may include one or more Utilities. The activities of the utility companies that own the utilities need to be coordinated, and the status of each utility needs to be tracked. For every Utility added to the Project, a Utility Coordination Activity is automatically added to the project schedule and displays the Utility company name.

To maintain a Project, access the Project Maintenance Main Page by clicking on the Edit icon next to the Project’s Des # in the Des Basket or to the right of the Project in the Project Search - Search Results Panel.

Des Basket

Project Search - Search Results Panel

Access to menu selections, icons and features is dependent on a User’s role and security level. For details, refer to Understanding the Screen in the Getting Started section.

Click on the Utilities icon or link in the General Maintenance section of the Project Maintenance Main Page or click on the Utilities icon below the Header on any Project Maintenance Panel.
A **Utility Coordination Activity Type** must exist before a Utility may be added to a Project. A message displays when the mouse hovers over the icon on the icon bar.

If all **Utility Coordination Activities** have been completed for the Project, Utilities may not be added or deleted. The Panel may or may not display information, depending on whether Utility Company information was added to the Project prior to the Activity being completed. A message displays directly below the **Utility Panel**’s title bar explaining that no additional information may be added or deleted.
Utilities associated with a Project are displayed in the **Utility Coordination Panel**. From this Panel, Utilities may be added or deleted.

### No Utility data were entered for this Project

![Utility Coordination Panel with No Utility Data](image)

### All Utilities are completed. Adding and/or deleting Utility data is not allowed.

![Utility Coordination Panel with All Utilities Completed](image)

Access to menu selections, icons and features is dependent on a User’s role and security level. For details, refer to **Understanding the Screen** in the Getting Started section.

Instructions for common functions such as **Viewing Details**, **Applying Filters**, **Sorting**, **Showing More Items per Page**, and **Exporting to Microsoft Excel** may be found in the Getting Started section.

### Adding a Utility

To add a Utility, click on the **Add New** icon to the right of the **Utility Number** column heading.

In the **ADD Screen Mode**, select the **Utility Company Type** and then the **Utility Company** from the dropdown lists. The values in the **Utility Company** dropdown list populate based on the **Type**.
Field values that are grayed out are auto-populated, and therefore **NON-EDITABLE**. Fields with a peach background are **REQUIRED**. Fields with no background color are **OPTIONAL**.

Dropdown fields have an auto-complete feature. For example, click on the Utility Company Type dropdown arrow to the right of the field for a complete list of available Types. Typing a letter in the dropdown field navigates to the first value in the list that begins with that letter. For example, typing a “W” displays “Water”.

Click the **Save** button to save the new record and return to the **Utility Coordination Panel** or click on the **Cancel** button to exit without saving. If saving, click on the **OK** button at the confirmation message. Then, click on the **Cancel** button to return to the **Project Maintenance Main Page**.
SPMS will not save the record or leave the **ADD Screen Mode** if a required field is left empty. Instead, a red *asterisk (\*)* will appear to the right of the field. The cursor will blink inside text fields while dropdown fields will be highlighted.

Once saved, the new Utility should be visible in the List. If not, click on any column heading twice to re-sort and refresh the List.

### Deleting a Utility

To delete a Utility, click on the **Delete** icon next to the record to be removed.

A confirmation message displays. Click on the **OK** button to confirm the deletion or click on the **Cancel** button to exit without saving any changes.

The Utility is removed from the list.

### Project Messages
This section displays messages related to the User’s Projects. Once action is taken to correct the issue, the Project Message is automatically deleted by SPMS. The list must be refreshed manually by clicking on the **Refresh** icon to the right of the **Message Text** column heading.

Data may be sorted in ascending or descending order numerically (smallest to largest or largest to smallest), alphabetically (A to Z or Z to A) or by date and time (oldest to newest or newest to oldest). The default sort is by Message Date (descending). To re-sort the list, click on any column heading of the field to be sorted.

Click on the **Edit** icon to the right of a Project Message to open the Project Maintenance Main Page and then click on an icon to maintain the Project or view a report.
Only SPMS Administrators have the authority to delete Project Messages manually. To delete a Message, click on the Delete icon next to the message to be removed. The Delete icon is only visible to Administrators.

A Confirm Delete message displays. Click on the OK button to confirm the change or click on the Cancel button to exit without saving any changes.
Project Tasks

My Tasks
The My Tasks panel consists of three parts: Search, Activity Legend, and Activities Count. The Activities Count appears with the name of the Contact Person who logs into SPMS. It enumerates all of the activities assigned to the contact person. The Activity Legend contains five (5) categories of Activities and helps narrow the numerical amount of the records search. The Search Panel allows for more specific search utilizing: Des Number, Designed by, Activity Start and Finish Status, and Date Range From-To.

To access My Tasks, select Project Tasks, and then My Tasks from the SPMS menu on the Home Page and the My Tasks panel is displayed.

From the My Tasks Panel, Activities may be searched, viewed, and maintained.

Access to menu selections, icons and features is dependent on a User’s role and security level. For details, refer to Understanding the Screen in the Getting Started section.
Instructions for common functions such as Viewing Details, Applying Filters, Sorting, Showing More Items per Page, and Exporting to Microsoft Excel may be found in the Getting Started section.

Search Panel

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.

To search for a specific Des # out of the 5983 listed under the Activities Count, place the Des # in the Des # box, also select from the drop down list under Activity Finish Status, Complete. Click the Search button (located directly under the Activity Legend); to clear, click on the Clear button.

Activity Legend

The five (5) legends categorize all the activities by various field parameters as displayed below.
To narrow a search uncheck any parameter in the Activity Legend and click on the Search button, and the requested Activities are displayed under the Activities Count.

The Activities Count panel has the following functions: Add all (Activities) to the Des Basket, Task Status Report, Export to Excel.

The Activities Count Panel display only 300 records per viewing as displayed on the bar to the left. To view the next 300 records, click Next and the records to be viewed are listed on the bar to the left. To view the previous records, click First Prev on the bar to the right.

To view the last 300 records of the Activities Count, click Last, and the 300 last records are displayed.

Add all to Des Basket

Select and click the Add all to Des Basket icon located at the upper right of the Activities Count Panel in order to place and display all of the activities by Des Number into the Des Basket. The Des Basket is limited to 200 Des #’s at a time.
The Des basket is limited to 200 Des #’s. The first 200 Des #’s were added.

Click **OK** in the message window to acknowledge the addition of the Des #’s to the Des Basket and the activities by Des Number will be displayed in the Des Basket.

Each of the listed Des #’s in the Des Basket contains two additional functions as depicted by the Icons to the right of the Edit Schedule. The two Icons are Funding and Full Project Listing Report.

**Task Status Report**

Select and click the Pdf Icon located at the upper right of the Activities Count Panel. This report will be displayed and contain all of the activities information assigned to the named contact person by Project Manager, Contract #, and Des #.
Export to Excel

Select and click the Excel 📋 Icon located at the upper right of the of the Activities Count Panel to Export the activities information to Excel.

Adding Activity by Des to Des Basket

To add an activity by Des # to the Des Basket, click the Add to Des Basket 🛍️ Icon for a selected record located to the right of the Program Manager column.
The selected record is added to the **Des Basket** and is displayed as the last Des # in the list.

**Editing a Des**

To edit the Des, click the **Edit Des Maintenance** icon for a selected record located to the right of the Program Manager Column and Des maintenance is displayed.
Editing a Schedule

To edit a schedule, click the Edit Schedule icon for a selected record located to the right of the Program Manager Column and the Schedule is displayed.
<table>
<thead>
<tr>
<th>Act ID</th>
<th>Activity</th>
<th>Est Actual Start Date</th>
<th>Start Status</th>
<th>Est Actual Finish Date</th>
<th>Finish Status</th>
<th>Duration Days</th>
<th>Managing Organization</th>
<th>Managing Contact Name</th>
<th>Activity Log</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Project Authorization</td>
<td>09/06/2011</td>
<td>L</td>
<td>02/26/2011</td>
<td>L</td>
<td>5</td>
<td>Fort Wayne - Production</td>
<td>Leslie, John</td>
<td>Y</td>
</tr>
<tr>
<td>5</td>
<td>Design Survey</td>
<td>11/06/2011</td>
<td>L</td>
<td>05/24/2012</td>
<td>L</td>
<td>196</td>
<td>Fort Wayne - Production</td>
<td>Leslie, John</td>
<td>N</td>
</tr>
<tr>
<td>6</td>
<td>Hydraulics design</td>
<td>09/04/2012</td>
<td>L</td>
<td>07/03/2012</td>
<td>L</td>
<td>90</td>
<td>Structural Services</td>
<td>Reekie, Anne</td>
<td>H</td>
</tr>
<tr>
<td>7</td>
<td>Stage 1 Design (0-30%)</td>
<td>07/03/2012</td>
<td>L</td>
<td>11/03/2012</td>
<td>L</td>
<td>156</td>
<td>Fort Wayne - Production</td>
<td>Leslie, John</td>
<td>N</td>
</tr>
<tr>
<td>8</td>
<td>Preliminary Field Check</td>
<td>11/30/2012</td>
<td>L</td>
<td>12/24/2012</td>
<td>L</td>
<td>24</td>
<td>Fort Wayne - Production</td>
<td>Leslie, John</td>
<td>N</td>
</tr>
<tr>
<td>9</td>
<td>Soils Investigation</td>
<td>12/24/2012</td>
<td>L</td>
<td>06/08/2012</td>
<td>L</td>
<td>156</td>
<td>Fort Wayne - Production</td>
<td>Leslie, John</td>
<td>N</td>
</tr>
<tr>
<td>10</td>
<td>Railroad Coordination</td>
<td>12/24/2012</td>
<td>L</td>
<td>01/23/2013</td>
<td>L</td>
<td>30</td>
<td>Fort Wayne - Production</td>
<td>Leslie, John</td>
<td>N</td>
</tr>
<tr>
<td>11</td>
<td>Permits Approval</td>
<td>12/24/2012</td>
<td>L</td>
<td>04/16/2014</td>
<td>L</td>
<td>496</td>
<td>Fort Wayne - Production</td>
<td>Leslie, John</td>
<td>N</td>
</tr>
<tr>
<td>12</td>
<td>Plans To Hearing</td>
<td>12/24/2012</td>
<td>L</td>
<td>01/05/2013</td>
<td>L</td>
<td>10</td>
<td>Fort Wayne - Production</td>
<td>Leslie, John</td>
<td>N</td>
</tr>
<tr>
<td>13</td>
<td>Plans To R/W</td>
<td>12/24/2012</td>
<td>L</td>
<td>01/13/2012</td>
<td>L</td>
<td>30</td>
<td>Fort Wayne - Production</td>
<td>Leslie, John</td>
<td>N</td>
</tr>
</tbody>
</table>
Tasks by Persons Name

To access **Tasks by Persons Name**, select **Project Tasks**, and then **Tasks by Persons Name** from the SPMS menu on the **Home Page** and the **Tasks by Persons Name** panel is displayed.

Instructions for common functions such as **Viewing Details**, **Applying Filters**, **Sorting**, **Showing More Items per Page**, and **Exporting to Microsoft Excel** may be found in the **Getting Started** section.

From the **Select Person Responsible for Activity** Panel, Search Contact by Name or Search Contact by Department, Select Contact, Get Activity and Select Project Manager.

Access to menu selections, icons and features is dependent on a User's role and security level. For details, refer to **Understanding the Screen** in the **Getting Started** section.
Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.

**Selecting Contact by Name**

To search by name, place the last name in the **Search Contact by Name** box, click the **Search** button, name is highlighted and displayed in the **Select Contact** box, then click the **Get Activity** button, and the **Tasks** Panel is displayed with the Contact Person’s Activities.

**Selecting Contact by Department**

To search by **Selecting Contact by Department**, select and click the drop down arrow in the box and select the appropriate department. Then click the **Search** button next to the department selected, a list of contacts is displayed, select the contact, and then click **Get Activity** button and the **Tasks** panel displays all of the tasks assigned to the contact person.
Selecting a Project Manager

To select Project Manager, select and click “Select Project Manager” on the lower left of the Select Person Responsible for Activity panel or click on the Add icon on the lower right of the panel.

Select the project manager and click Get Activity button; all of the activities listed for the selected manager is displayed in the Activities Count Panel.
### Select Person Responsible for Activity

#### Project Managers

<table>
<thead>
<tr>
<th>Name</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smith, John (555-1234)</td>
<td></td>
</tr>
<tr>
<td>Smith, Jane (555-5678)</td>
<td></td>
</tr>
<tr>
<td>Doe, Bob (555-9876)</td>
<td></td>
</tr>
<tr>
<td>Brown, Mike (555-4321)</td>
<td></td>
</tr>
</tbody>
</table>

- **Get Activity**

### Activities Count: 294

<table>
<thead>
<tr>
<th>Activity</th>
<th>Start Date</th>
<th>Start Status</th>
<th>Finish Date</th>
<th>Finish Status</th>
<th>Project</th>
<th>Project Manager</th>
</tr>
</thead>
<tbody>
<tr>
<td>Funds For PE</td>
<td>08/19/2009</td>
<td>Complete</td>
<td>09/09/2009</td>
<td>Complete</td>
<td>Environmental Mitigation</td>
<td>Saxe, Nathan</td>
</tr>
<tr>
<td>Award</td>
<td>06/30/2009</td>
<td>Locked</td>
<td>07/31/2009</td>
<td>Locked</td>
<td>Environmental Mitigation</td>
<td>Saxe, Nathan</td>
</tr>
<tr>
<td>Award</td>
<td>05/20/2009</td>
<td>Complete</td>
<td>06/10/2009</td>
<td>Complete</td>
<td>Environmental Mitigation</td>
<td>Saxe, Nathan</td>
</tr>
<tr>
<td>Funds For PE</td>
<td>08/18/2009</td>
<td>Complete</td>
<td>11/02/2009</td>
<td>Complete</td>
<td>Environmental Mitigation</td>
<td>Saxe, Nathan</td>
</tr>
<tr>
<td>Funds For PE</td>
<td>11/05/2009</td>
<td>Complete</td>
<td>11/23/2009</td>
<td>Complete</td>
<td>Environmental Mitigation</td>
<td>Saxe, Nathan</td>
</tr>
<tr>
<td>Funds For PE</td>
<td>08/10/2009</td>
<td>Complete</td>
<td>09/09/2009</td>
<td>Complete</td>
<td>Environmental Mitigation</td>
<td>Saxe, Nathan</td>
</tr>
<tr>
<td>Funds For PE</td>
<td>06/19/2009</td>
<td>Complete</td>
<td>07/02/2009</td>
<td>Complete</td>
<td>Environmental Mitigation</td>
<td>Saxe, Nathan</td>
</tr>
<tr>
<td>Funds For PE</td>
<td>08/18/2009</td>
<td>Complete</td>
<td>09/23/2009</td>
<td>Complete</td>
<td>Environmental Mitigation</td>
<td>Saxe, Nathan</td>
</tr>
<tr>
<td>Funds For PE</td>
<td>06/19/2009</td>
<td>Complete</td>
<td>09/08/2009</td>
<td>Complete</td>
<td>Environmental Mitigation</td>
<td>Saxe, Nathan</td>
</tr>
<tr>
<td>Award</td>
<td>06/02/2009</td>
<td>Complete</td>
<td>09/06/2009</td>
<td>Complete</td>
<td>Environmental Mitigation</td>
<td>Saxe, Nathan</td>
</tr>
<tr>
<td>Funds For PE</td>
<td>06/19/2009</td>
<td>Complete</td>
<td>09/16/2009</td>
<td>Complete</td>
<td>Environmental Mitigation</td>
<td>Saxe, Nathan</td>
</tr>
</tbody>
</table>
Reference Data

AAR List

The AAR List contains railroad crossings represented by unique numerical codes determined by the AAR (Associations of American Railroads). A Project may include one or more rail crossings.

To maintain the list of AARs, select AAR List from the Reference Data menu.

From the AAR List Panel, AARs may be added, made historical or made active.

Access to menu selections, icons and features is dependent on a User’s role and security level. For details, refer to Understanding the Screen in the Getting Started section.
Instructions for common functions such as Viewing Details, Applying Filters, Sorting, Showing More Items per Page, and Exporting to Microsoft Excel may be found in the Getting Started section.

Adding an AAR

To add an AAR, click on the Add New icon to the right of the Status Date column heading.

In the ADD Screen Mode, enter information as needed.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.

Click on the Save button to save the new record and return to the AAR List Panel or click on the Cancel button to exit without saving. If saving, click on the OK button at the confirmation message.
SPMS will not save the record or leave the **ADD Screen Mode** if a required field is left empty. Instead, a red **asterisk (**) will appear to the right of the field and the cursor will blink inside the field.

SPMS does not allow duplicates. If the record already exists in the database, a message displays.

Once saved, the new AAR should be visible in the List. If not, click on the **Status Date** column heading twice to re-sort and refresh the List.

**Making an AAR Historical**

The Status of an AAR is either Active or Historical (Inactive). The List of AARs may be sorted by Status to place all historical AARs at the bottom of the list. Historical AARs may be made Active again.

To make an AAR historical, click on the **Make Historical** icon next to the record to be made historical.

A confirmation message displays. Click on the **OK** button to confirm the change or click on the **Cancel** button to exit without saving any changes.
The AAR’s **Status** changes to Historical, the **Status Date** changes to the current date and the **Make Active** icon replaces the **Make Historical** icon. To sort the AAR List so all Historical AARs are moved to the bottom of the list, click on the **Status** column heading to sort the column.

| 152478G | Historical | 07/28/2010 | 60 |

### Making an AAR Active

To make the AAR Active again, click on the **Make Active** icon next to the record to be made active.

A confirmation message displays. Click on the **OK** button to confirm the change or click on the **Cancel** button to exit without saving any changes.

| 152478G | Active | 07/28/2010 | 60 |

### Activity Code List

The **Activity Code List** contains a master list of SPMS Activity Codes that are used in a Project schedule. Each Activity Code has default duration and may have a minimum and maximum duration value defined. Additionally, a default contact name is assigned to the activity. Maintaining the **Activity Code List** is the responsibility of the SPMS Administrator.

To maintain the list of Activity Codes, select **Activity Code List** from the **Reference Data** menu.
From the **Activity Code List Panel**, Activity Codes may be added, edited, or made historical or active. Access to menu selections, icons and features is dependent on a User's Position and security level. For details, refer to **Understanding the Screen** in the Getting Started section.
Instructions for common functions such as Viewing Details, Applying Filters, Sorting, Showing More Items per Page, and Exporting to Microsoft Excel may be found in the Getting Started section.

Adding an Activity Code

To add an Activity Code, click on the Add New icon to the right of the Status column heading.

In the ADD Screen Mode, enter information as needed.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.
Click the **Save** button to save the new record and return to the **Activity Code List Panel** or click on the **Cancel** button to exit without saving. If saving, click on the **OK** button at the confirmation message.

SPMS will not save the record or leave the **ADD Screen Mode** if a required field is left empty. Instead, a red **asterisk (**) will appear to the right of the field and the cursor will blink inside the field.

SPMS does not allow duplicates. If the record already exists in the database, a message displays.

Once saved, the new Activity Code should be visible in the List. If not, click on the **Activity Code** column heading twice to re-sort and refresh the List or use the **Filter** feature to locate the new record.

**Editing an Activity Code**

To edit an Activity Code, click on the **Edit** icon next to the record to be updated.

In the **EDIT Screen Mode**, update fields as needed.

Field values that are grayed out are auto-populated, and therefore **NON-EDITABLE**. Fields with a peach background are **REQUIRED**. Fields with no background color are **OPTIONAL**.
Click the **Save** button to save the record and return to the **Activity Code List Panel** or click on the **Cancel** button to exit without saving.

SPMS will not save the record or leave the **EDIT Screen Mode** if a required field is left empty. Instead, a red asterisk (*) will appear to the right of the field and the cursor will blink inside the field.

The changes should be visible in the List. If not, click on the **Activity Code** column heading to re-sort and refresh the List or use the **Filter** feature to locate the new record.

### Making an Activity Code Historical

The Status of an Activity Code is either Active or Historical (Inactive). The List of Activity Codes may be sorted by Status to place all historical Activity Codes at the bottom of the list. Historical Activity Codes may be made Active again.

To make an Activity Code historical, click on the **Make Historical** 🗼 icon next to the record to be made historical.

A confirmation message displays. Click on the **OK** button to confirm the change or click on the **Cancel** button to exit without saving any changes.
The Activity Code's **Status** changes to Historical and the **Make Active** 🏷 icon replaces the **Make Historical** 🏷️ icon. To sort the Activity Code List so all Historical Activity Codes are moved to the bottom of the list, click on the **Status** column heading to sort the column.

| 003 | Professional Services | 203 | 203 | 203 | Historical | 🏷️ |

**Making an Activity Code Active**

To make the Activity Code Active again, click on the **Make Active** 🏷️ icon next to the record to be made active.

A confirmation message displays. Click on the **OK** button to confirm the change or click on the **Cancel** button to exit without saving any changes.

The Activity Code's **Status** changes back to Active and the **Make Historical** 🏷️ icon replaces the **Make Active** 🏷️ icon.

| 003 | Professional Services | 203 | 203 | 203 | Active | 🏷️ | 🏷️ |

**Adding an Activity Position**

To view a list of Positions for an Activity Code, click on the **Maintain Position List** 🏷️ icon next to that record in the **Activity Codes Panel**.
Activity Code Positions may be added, edited, or deleted from the Activity Code Position Panel.

To add a Position, click on the Add New icon to the right of the Contact Name column heading.

In the ADD Screen Mode, select the Designed By value from the dropdown list and complete optional fields as needed.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.
The Designed By dropdown list only includes Designed By values not already listed in the Activity Code Position Panel. For example, in the screen below, Crawfordsville is the only Designed By not listed and the only option available in the dropdown list.

<table>
<thead>
<tr>
<th>Activity Code</th>
<th>Designed By</th>
<th>Position</th>
</tr>
</thead>
<tbody>
<tr>
<td>003</td>
<td>Ft. Wayne District</td>
<td></td>
</tr>
<tr>
<td>003</td>
<td>Greenfield District</td>
<td></td>
</tr>
<tr>
<td>003</td>
<td>Local</td>
<td></td>
</tr>
<tr>
<td>003</td>
<td>LaPorte District</td>
<td></td>
</tr>
<tr>
<td>003</td>
<td>State</td>
<td></td>
</tr>
<tr>
<td>003</td>
<td>Seymour District</td>
<td></td>
</tr>
<tr>
<td>003</td>
<td>Toll Road District</td>
<td></td>
</tr>
<tr>
<td>003</td>
<td>Vincennes District</td>
<td></td>
</tr>
</tbody>
</table>

Showing 1-8 of 8

Click on the Find icon next to the Position textbox to display the Search Position panel.
To search by contact, click in the Search By Contact radio button. Then, click on the Find icon next to Search Contact to populate the Contact dropdown list with all available contacts or enter part of the Contact’s name in the Search Contact textbox and click on the Find icon to narrow the list. Select the Managing Organization and Managing Contact from their dropdown lists.

To search by organization, click in the Search By Organization radio button. Then, click on the Find icon next to Search Organization to populate the Organization dropdown list with all available contacts or organizations or enter part of the Organization’s name in the Search Organization textbox and click on the Find icon to narrow the list. Select the Managing Organization and Managing Contact from their dropdown lists.

Click on the Assign Position/Contact button to populate the Position fields.
Click on the **OK** button at the confirmation message to return to the **Activity Code Position Panel**.

SPMS will not save the record or leave the **ADD Screen Mode** if a required field is left empty. Instead, a red **asterisk (\*)** will appear to the right of the field and the cursor will blink inside the field.

The new Position should be visible in the list. Click on the **Close** button to return to the **Activity Codes Panel**.

**Editing an Activity Position**

To view a list of Positions for an Activity Code, click on the **Maintain Position List** icon next to that record in the **Activity Codes Panel**.
To edit a Position, click on the Edit icon next to the record to be updated.

Click on the Find icon next to Search Organization to populate the Organization dropdown list with all available organizations or enter part of the Organization’s name in the Search Organization text box and click on the Find icon to narrow the list. Click the Organization dropdown list to select an Organization. The values in the Position dropdown list are populated when the Organization is selected. Select a Position from the Position dropdown list.

Click on the Assign Position/Contact button to populate the Position fields.
Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.

Click on the OK button at the confirmation message to return to the Activity Code Position Panel.

The updated Position should be visible in the list. Click on the Close button to return to the Activity Codes Panel.

Deleting an Activity Position

To delete a Position, click on the Delete icon next to the record to be removed.

A confirmation message displays. Click on the OK button to confirm the deletion or click on the Cancel button to exit without saving any changes.
The Position is removed from the list.

**Appropriation Code List**

The **Appropriation Code List** contains funding types involved in INDOT Projects. The funding types are represented by unique numerical codes.

To maintain the list of Appropriation Codes, select **Appropriation Code List** from the **Reference Data** menu.

From the **Appropriation Code List Panel**, Appropriation Codes may be added, edited, or made historical or active.

Access to menu selections, icons and features is dependent on a User’s role and security level. For details, refer to **Understanding the Screen** in the Getting Started section.
Instructions for common functions such as Viewing Details, Applying Filters, Sorting, Showing More Items per Page, and Exporting to Microsoft Excel may be found in the Getting Started section.

Adding an Appropriation Code

To add an Appropriation Code, click on the Add New icon to the right of the Status Date column heading.

In the ADD Screen Mode, enter information as needed.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.

Dropdown fields have an auto-complete feature. For example, click on the Type dropdown arrow to the right of the field for complete lists of available Types. Typing any letter in a dropdown field navigates to the first value in the list that begins with that letter. For example, typing an “L” displays “Local”.
Click the **Save** button to save the new record and return to the **Appropriation Code List Panel** or click on the **Cancel** button to exit without saving. If saving, click on the **OK** button at the confirmation message.

SPMS will not save the record or leave the ADD Screen Mode if a required field is left empty. Instead, a red asterisk (*) will appear to the right of the field and the cursor will blink inside the field.

SPMS does not allow duplicates. If the record already exists in the database, a message displays.

Once saved, the new Appropriation Code should be visible in the List. If not, click on the **Status Date** column heading twice to re-sort and refresh the List.

**Editing an Appropriation Code**

To edit an Appropriation Code, click on the **Edit** icon next to the record to be updated.
In the **EDIT Screen Mode**, update fields as needed.

Field values that are grayed out are auto-populated, and therefore **NON-EDITABLE**. Fields with a peach background are **REQUIRED**. Fields with no background color are **OPTIONAL**.

Click on the **Save** button to save the record and return to the **Appropriation Code List Panel** or click on the **Cancel** button to exit without saving.

SPMS will not save the record or leave the **EDIT Screen Mode** if a required field is left empty. Instead, a red asterisk (*) will appear to the right of the field and the cursor will blink inside the field.

The changes should be visible in the List. If not, click on the **Status Date** column heading to re-sort and refresh the List.

**Making an Appropriation Code Historical**

The Status of an Appropriation Code is either Active or Historical (Inactive). The List of Appropriation Codes may be sorted by Status to place all historical Codes at the bottom of the list. Historical Appropriation Codes may be made Active again.

To make an Appropriation Code historical, click on the **Make Historical** 🕰 icon next to the record to be made historical.

A confirmation message displays. Click on the **OK** button to confirm the change or click on the **Cancel** button to exit without saving any changes.
The Appropriation Code’s **Status** changes to Historical, the **Status Date** changes to the current date and the **Make Active** 🏛 icon replaces the **Make Historical** 🏘️ icon. To sort the Appropriation Code List so all Historical Codes are moved to the bottom of the list, click on the **Status** column heading to sort the column.

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>Source</th>
<th>Status</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>010</td>
<td>Consolidated Primary</td>
<td>Federal</td>
<td>Historical</td>
<td>07/29/2010</td>
</tr>
</tbody>
</table>

**Making an Appropriation Code Active**

To make the Appropriation Code Active again, click on the **Make Active** 🏛 icon next to the record to be made active.

A confirmation message displays. Click on the **OK** button to confirm the change or click on the **Cancel** button to exit without saving any changes.

The Appropriation Code’s **Status** changes back to Active, the **Status Date** changes to the current date and the **Make Historical** 🏘️ icon replaces the **Make Active** 🏛 icon.

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>Source</th>
<th>Status</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>010</td>
<td>Consolidated Primary</td>
<td>Federal</td>
<td>Active</td>
<td>07/29/2010</td>
</tr>
</tbody>
</table>

**Code Table List**

The **Code Table List** contains SPMS lookup tables and their associated code values/items.

To maintain the list of Code Tables, select **Code Table List** from the **Reference Data** menu.
From the **Code Table List Panel**, Code Tables and Items in Code Tables may be added, edited, or made historical or active.

Access to menu selections, icons and features is dependent on a User's role and security level. For details, refer to **Understanding the Screen** in the Getting Started section.
Instructions for common functions such as Viewing Details, Applying Filters, Sorting, Showing More Items per Page, and Exporting to Microsoft Excel may be found in the Getting Started section.

Adding a Code Table

To add a Code Table, click on the Add New + icon to the right of the Status Date column heading.

In the ADD Screen Mode, enter information as needed.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.

The default Maximum Length is 4.

Dropdown fields have an auto-complete feature. For example, click on the Security dropdown arrow to the right of the field for a complete list of available security tokens. Typing a letter in the dropdown field navigates to the first value in the list that begins with that letter. For example, typing a “D” displays “Date of Final Payment”.
Click the **Save** button to save the new record and return to the **Code Table List Panel** or click on the **Cancel** button to exit without saving. If saving, click on the **OK** button at the confirmation message.

**Message**

![New item has been added successfully.]

**OK**
SPMS will not save the record or leave the ADD Screen Mode if a required field is left empty. Instead, a red asterisk (*) will appear to the right of the field and the cursor will blink inside the field.

SPMS does not allow duplicates. If the record already exists in the database, a message displays.

Once saved, the new Code Table should be visible in the List. If not, click on the Status Date column heading twice to re-sort and refresh the List.

**Editing a Code Table**

To edit a Code Table, click on the Edit icon next to the record to be updated. In the EDIT Screen Mode, update fields as needed.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.
Click on the **Save** button to save the record and return to the **Code Table List Panel** or click on the **Cancel** button to exit without saving or.

SPMS will not save the record or leave the **EDIT Screen Mode** if a required field is left empty. Instead, a red **asterisk (**) will appear to the right of the field and the cursor will blink inside the field.

![Description field](image)

The changes should be visible in the List. If not, click on the **Status Date** column heading to re-sort and refresh the List.

**Adding an Item to a Code Table**

To view a Code Table's Items, click on the **Items** icon next to that record in the **Code Table List Panel**.

Items in Code Tables may be added, edited, or made historical or active.

![Code Table Items](image)

To add an Item to a Code Table, click on the **Add New** icon to the right of the **Status Date** column heading.

In the **ADD Screen Mode**, enter information as needed.

Field values that are grayed out are auto-populated, and therefore **NON-EDITABLE**. Fields with a peach background are **REQUIRED**. Fields with no background color are **OPTIONAL**.
Click the **Save** button to save the new record and return to the **Code Table Items Panel** or click on the **Cancel** button to exit without saving. If saving, click on the **OK** button at the confirmation message.

SPMS will not save the record or leave the **ADD Screen Mode** if a required field is left empty. Instead, a red **asterisk** (*) will appear to the right of the field and the cursor will blink inside the field.

SPMS does not allow duplicates. If the record already exists in the database, a message displays.

Once saved, the new Item should be visible in the List. If not, click on the **Status Date** column heading twice to re-sort and refresh the List.
Click on the Close button to return to the Code Table Panel.

**Editing an Item in a Code Table**

To view a Code Table’s Items, click on the Items icon next to that record in the Code Table List Panel.

Items in Code Tables may be added, edited, or made historical or active.

To edit an Item in a Code Table, click on the Edit icon next to the record to be updated.

In the **EDIT Screen Mode**, update fields as needed.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.

Click the Save button to save the record and return to the Code Table Items List Panel or click on the Cancel button to exit without saving.

SPMS will not save the record or leave the EDIT Screen Mode if a required field is left empty. Instead, a red asterisk (*) will appear to the right of the field and the cursor will blink inside the field.
The changes should be visible in the List. If not, click on the Status Date column heading to re-sort and refresh the List.

Click on the Close button to return to the Code Table Panel.

**Making a Code Table Historical**

The Status of a Code Table is either Active or Historical (Inactive). The List of Code Tables may be sorted by Status to place all historical Code Tables at the bottom of the list. Historical Code Tables may be made Active again.

To make a Code Table historical, click on the Make Historical icon next to the record to be made historical.

A confirmation message displays. Click on the OK button to confirm the change or click on the Cancel button to exit without saving any changes.

The Code Table’s Status changes to Historical, the Status Date changes to the current date and the Make Active icon replaces the Make Historical icon. To sort the Code Table List so all Historical Code Tables are moved to the bottom of the list, click on the Status column heading to sort the column.

**Making a Code Table Active**

To make the Code Table Active again, click on the Make Active icon next to the record to be made active.

A confirmation message displays. Click on the OK button to confirm the change or click on the Cancel button to exit without saving any changes.
The Code Table’s **Status** changes back to Active, the **Status Date** changes to the current date and the **Make Historical** 🗼 icon replaces the **Make Active** 🔄 icon.

### Making an Item in a Code Table Historical

The Status of an Item is either Active or Historical (Inactive). The List of Code Table Items may be sorted by Status to place all historical Items at the bottom of the list. Historical Items may be made Active again.

To make an Item historical, click on the **Make Historical** 🗼 icon next to the record to be made historical.

A confirmation message displays. Click on the **OK** button to confirm the change or click on the **Cancel** button to exit without saving any changes.

The Item’s **Status** changes to Historical, the **Status Date** changes to the current date and the **Make Active** 🔄 icon replaces the **Make Historical** 🗼 icon. To sort the Item List so all Historical Items are moved to the bottom of the list, click on the **Status** column heading to sort the column.

### Making an Item in a Code Table Active

To make the Item Active again, click on the **Make Active** 🔄 icon next to the record to be made active.

A confirmation message displays. Click on the **OK** button to confirm the change or click on the **Cancel** button to exit without saving any changes.

The Item’s **Status** changes back to Active, the **Status Date** changes to the current date and the **Make Historical** 🗼 icon replaces the **Make Active** 🔄 icon.
Corporate Bridge List

The Corporate Bridge list contains a list of Indiana Bridges. From this list a bridge can be selected and added to a Project when the bridge needs maintenance or replaced. If a new bridge is being built it is not added to the Corporate Bridge List until the bridge construction is finished, the project is completed and the NBI number is assigned. Maintaining and adding bridges to the Corporate Bridge list are done by selecting Update Corporate Bridge from the Reference Data menu.

In certain instances, this list of Corporate Bridges may need to be maintained manually. This may only be done by an Administrator or a User with the appropriate permission. To maintain manually, select Corporate Bridge List from the Reference Data menu.

From the Corporate Bridge List Panel, Corporate Bridges may be added, edited, or made historical or active. Structures and inspections may also be added, edited or deleted.
Access to menu selections, icons and features is dependent on a User’s role and security level. For details, refer to Understanding the Screen in the Getting Started section.

Instructions for common functions such as Viewing Details, Applying Filters, Sorting, Showing More Items per Page, and Exporting to Microsoft Excel may be found in the Getting Started section.

Adding a Corporate Bridge

To add a Corporate Bridge, click on the Add New icon to the right of the Status Date column heading.

In the ADD Screen Mode, enter information as needed.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.
Dropdown fields have an auto-complete feature. For example, click on the County dropdown arrow to the right of the field for complete lists of available counties. Typing any letter in a dropdown field navigates to the first value in the list that begins with that letter. For example, typing an “R” displays “Randolph.”
Date fields have two options. A date (mm/dd/yyyy) may be entered directly in the field or the Calendar icon may be used to find a date. Click on the Calendar icon to display the Calendar window.

Then, click on the desired date to populate the field.

Click the Save button to save the new record and return to the Corporate Bridge List Panel or click on the Cancel button to exit without saving. If saving, click on the OK button at the confirmation message.
SPMS will not save the record or leave the **ADD Screen Mode** if a required field is left empty. Instead, a red **asterisk** (*) will appear to the right of the field. The cursor will blink inside text fields while dropdown fields will be highlighted.

<table>
<thead>
<tr>
<th>NBI Number</th>
<th>*</th>
</tr>
</thead>
</table>

SPMS does not allow duplicates. If the record already exists in the database, a message displays.

Once saved, the new Corporate Bridge should be visible in the List. If not, click on the **Status Date** column heading twice to re-sort and refresh the List.

**Editing a Corporate Bridge**

To edit a Corporate Bridge, click on the **Edit** icon next to the record to be updated.

In the **EDIT Screen Mode**, update fields as needed.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are **REQUIRED**. Fields with no background color are **OPTIONAL**.
Click on the Cancel button to exit without saving or click on the Save button to save the record and return to the Corporate Bridge List Panel.

SPMS will not save the record or leave the EDIT Screen Mode if a required field is left empty. Instead, a red asterisk (*) will appear to the right of the field. The cursor will blink inside text fields while dropdown fields will be highlighted.

The changes should be visible in the List. If not, click on the Status Date column heading to re-sort and refresh the List.

Making a Corporate Bridge Historical

The Status of a Corporate Bridge is either Active or Historical (Inactive). The List of Corporate Bridges may be sorted by Status to place all historical Bridges at the bottom of the list. Historical Corporate Bridges may be made Active again.

To make a Corporate Bridge historical, click on the Make Historical icon next to the record to be made historical.

A confirmation message displays. Click on the OK button to confirm the change or click on the Cancel button to exit without saving any changes.
The Corporate Bridge’s **Status** changes to Historical, the **Status Date** changes to the current date and the **Make Active** 🕵️‍♂️ icon replaces the **Make Historical** 🕵️‍♀️ icon. To sort the Corporate Bridge List so all Historical Bridges are moved to the bottom of the list, click on the **Status** column heading to sort the column.

### Making a Corporate Bridge Active

To make the Corporate Bridge Active again, click on the **Make Active** 🕵️‍♂️ icon next to the record to be made active.

A confirmation message displays. Click on the **OK** button to confirm the change or click on the **Cancel** button to exit without saving any changes.

The Corporate Bridge’s **Status** changes back to Active, the **Status Date** changes to the current date and the **Make Historical** 🕵️‍♀️ icon replaces the **Make Active** 🕵️‍♂️ icon.

### Adding a Structure to a Corporate Bridge

To view the Structure List for a Corporate Bridge, click on the **Structures** 🏛️ icon next to that record in the **Corporate Bridge List Panel**.

Structures may be added, edited, or deleted from the **Structure List Panel**.
To add a Structure, click on the Add New icon to the right of the Structure Date column heading.

In the ADD Screen Mode, enter the information as needed. The Structure Number, Prefix and Structure Date are populated from the bridge information. The Prefix and Structure Date may be changed, if needed.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.
Date fields have two options. A date (mm/dd/yyyy) may be entered directly in the field or the Calendar icon may be used to find a date. Click on the Calendar icon to display the Calendar window.

<table>
<thead>
<tr>
<th>July, 2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Su Mo Tu We Th Fr Sa</td>
</tr>
<tr>
<td>27 28 29 30  1  2 3</td>
</tr>
<tr>
<td>4  5  6  7  8  9 10</td>
</tr>
<tr>
<td>11 12 13 14 15 16 17</td>
</tr>
<tr>
<td>18 19 20 21 22 23 24</td>
</tr>
<tr>
<td>25 26 27 28</td>
</tr>
<tr>
<td>1  2  3  4  5  6  7</td>
</tr>
</tbody>
</table>

Then, click on the desired date to populate the field.

Click the **Save** button to save the new record and return to the **Structure List Panel** or click on the **Cancel** button to exit without saving. If saving, click on the **OK** button at the confirmation message.

**Message**

- **New item has been added successfully.**

**OK**
SPMS will not save the record or leave the **ADD Screen Mode** if a required field is left empty. Instead, a red asterisk (*) will appear to the right of the field and the cursor will blink inside the field.

<table>
<thead>
<tr>
<th>Prefix</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>*</td>
</tr>
</tbody>
</table>

SPMS does not allow duplicates. If the record already exists in the database, a message displays.

![Message]

Record already exists

OK

Once saved, the new Structure should be visible in the List. If not, click on the **Structure Date** column heading twice to re-sort and refresh the List.

If finished, click on the **Close** button to return to the **Corporate Bridge List Panel**.

**Editing a Structure associated with a Corporate Bridge**

To view the Structure List for a Corporate Bridge, click on the **Structures** icon next to that record in the **Corporate Bridge List Panel**.

Structures may be added, edited, or deleted from the **Structure List Panel**.

![Structure List]

<table>
<thead>
<tr>
<th>ID</th>
<th>Prefix</th>
<th>Structure Number</th>
<th>Designator</th>
<th>Structure Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>5816</td>
<td>ADAMS</td>
<td>00005</td>
<td></td>
<td>01/01/2000</td>
</tr>
</tbody>
</table>

To edit a Structure, click on the **Edit** icon next to the record to be updated.

In the **EDIT Screen Mode**, update the **County** and/or **Description** fields as needed.
Field values that are grayed out are auto-populated, and therefore **NON-EDITABLE**. Fields with a peach background are **REQUIRED**. Fields with no background color are **OPTIONAL**.

![Screen Mode: EDIT](image)

<table>
<thead>
<tr>
<th>Structure #</th>
<th>00006</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prefix</td>
<td>ADAMS</td>
</tr>
<tr>
<td>Designator</td>
<td></td>
</tr>
<tr>
<td>Structure Date</td>
<td>01/01/2000</td>
</tr>
</tbody>
</table>

Click the **Save** button to save the record and return to the **Structure List Panel** or click on the **Cancel** button to exit without saving.

SPMS will not save the record or leave the **EDIT Screen Mode** if a required field is left empty. Instead, a red **asterisk (*)** will appear to the right of the field. The cursor will blink inside text fields while dropdown fields will be highlighted.

The changes should be visible in the List. If not, click on the **Structure Date** column heading to re-sort and refresh the List.

If finished, click on the **Close** button to return to the **Corporate Bridge List Panel**.

**Deleting a Structure associated with a Corporate Bridge**

To delete a Structure, click on the **Delete** icon next to the record to be removed.

A confirmation message displays. Click on the **OK** button to confirm the deletion or click on the **Cancel** button to exit without saving any changes.

![Message from webpage](image)
The Structure is removed from the list.

If finished, click on the Close button to return to the Corporate Bridge List Panel.

**Adding an Inspection to a Corporate Bridge**

To view the Inspection List for a Corporate Bridge, click on the Inspections icon next to that record in the Corporate Bridge List Panel.

Inspections may be added, edited, or deleted from the Inspection List Panel.

<table>
<thead>
<tr>
<th>Inspection List</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Bridge Type:</strong> County</td>
</tr>
<tr>
<td><strong>NBI Number:</strong> 100003</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ID</th>
<th>Suff Year</th>
<th>Suff Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>5615</td>
<td>2005</td>
<td>90.50</td>
</tr>
</tbody>
</table>

To add an Inspection, click on the Add New icon to the right of the Suff Rating column heading.

In the **ADD Screen Mode**, enter the Sufficiency Year (the year that the bridge is inspected and given a sufficiency rating) and Sufficiency Rating (the bridge's numerical evaluation where 100 represents an entirely sufficient structure).

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.

<table>
<thead>
<tr>
<th>Screen Mode: ADD</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Sufficiency Year</strong></td>
</tr>
<tr>
<td><strong>Sufficiency Rating</strong></td>
</tr>
</tbody>
</table>

Click the Save button to save the new record and return to the Inspection List Panel or click on the Cancel button to exit without saving. If saving, click on the OK button at the confirmation message.
SPMS will not save the record or leave the ADD Screen Mode if a required field is left empty. Instead, a red asterisk (*) will appear to the right of the field and the cursor will blink inside the field.

SPMS does not allow duplicates. If the record already exists in the database, a message displays.

Once saved, the new Inspection should be visible in the List. If not, click on the Suff Rating column heading twice to re-sort and refresh the List.

If finished, click on the Close button to return to the Corporate Bridge List Panel.

**Editing an Inspection associated with a Corporate Bridge**

To view the Inspection List for a Corporate Bridge, click on the Inspections icon next to that record in the Corporate Bridge List Panel.

Inspections may be added, edited, or deleted from the Inspection List Panel.
To edit an Inspection, click on the Edit icon next to the record to be updated.

In the EDIT Screen Mode, update the Sufficiency Year (the year that the bridge is inspected and given a sufficiency rating) and Sufficiency Rating (the bridge's numerical evaluation) fields as needed.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.

Click the Save button to save the record and return to the Inspection List Panel or click on the Cancel button to exit without saving.

SPMS will not save the record or leave the EDIT Screen Mode if a required field is left empty. Instead, a red asterisk (*) will appear to the right of the field. The cursor will blink inside text fields while dropdown fields will be highlighted.

The changes should be visible in the List. If not, click on the Suff Rating column heading to re-sort and refresh the List.

If finished, click on the Close button to return to the Corporate Bridge List Panel.

Deleting an Inspection associated with a Corporate Bridge
To delete Inspection Information, click on the **Delete** icon next to the record to be removed.

A confirmation message displays. Click on the **OK** button to confirm the deletion or click on the **Cancel** button to exit without saving any changes.

The Inspection is removed from the list.

If finished, click on the **Close** button to return to the Corporate Bridge List Panel.

**Corporate Route List**

The SPMS **Corporate Route List** contains routes designated as State, U.S. and Interstate and includes Route Number, County, Route Status, Reference Post and Offset. All Corporate Routes selected for a Project must exist in this list.

The SPMS **Corporate Route List** is refreshed as needed from the **Road Inventory Database**, which contains INDOT’s official Corporate Route data. If a new Route is needed for a Project, it may be manually entered into the SPMS **Corporate Route List** by an SPMS Administrator.

To maintain the list of Corporate Routes, select **Corporate Route List** from the **Reference Data** menu.
From the **Corporate Route List Panel**, Corporate Routes may be added, edited, or made historical or active.

Access to menu selections, icons and features is dependent on a User's role and security level. For details, refer to [Understanding the Screen](#) in the Getting Started section.
Instructions for common functions such as Viewing Details, Applying Filters, Sorting, Showing More Items per Page, and Exporting to Microsoft Excel may be found in the Getting Started section.

Adding a Corporate Route

To add a Corporate Route, click on the Add New icon to the right of the Status Date column heading.

In the ADD Screen Mode, enter information as needed.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.
Dropdown fields have an auto-complete feature. For example, click on the Route Type dropdown arrow to the right of the field for a complete list of available Route Types. Typing any letter in a dropdown field navigates to the first value in the list that begins with that letter. For example, typing an “S” in the Route Type dropdown list displays “State Road”.

Click the **Save** button to save the new record and return to the **Corporate Route List Panel** or click on the **Cancel** button to exit without saving. If saving, click on the **OK** button at the confirmation message.
SPMS will not save the record or leave the **ADD Screen Mode** if a required field is left empty. Instead, a red *asterisk* (*) will appear to the right of the field. The cursor will blink inside text fields while dropdown fields will be highlighted.

![Route Number](image)

SPMS does not allow duplicates. If the record already exists in the database, a message displays.

![Message](image)

Once saved, the new Corporate Route should be visible in the List. If not, click on the **Status Date** column heading twice to re-sort and refresh the List.

**Editing a Corporate Route**

To edit a Corporate Route, click on the **Edit** icon next to the record to be updated.

In the **EDIT Screen Mode**, update fields as needed.

Field values that are grayed out are auto-populated, and therefore **NON-EDITABLE**. Fields with a peach background are **REQUIRED**. Fields with no background color are **OPTIONAL**.
Click the **Save** button to save the record and return to the **Corporate Route List Panel**. Click on the **Cancel** button to exit without saving.

SPMS will not save the record or leave the **EDIT Screen Mode** if a required field is left empty. Instead, a red *asterisk* (*) will appear to the right of the field. The cursor will blink inside text fields while dropdown fields will be highlighted.

The changes should be visible in the List. If not, click on the **Status Date** column heading to re-sort and refresh the List.

**Making a Corporate Route Historical**

The Status of a Corporate Route is either **Active** or Historical (Inactive). The List of Corporate Routes may be sorted by Status to place all historical Routes at the bottom of the list. Historical Corporate Routes may be made Active again.

To make a Corporate Route historical, click on the **Make Historical** 🏘️ icon next to the record to be made historical.

A confirmation message displays. Click on the **OK** button to confirm the change or click on the **Cancel** button to exit without saving any changes.
The Corporate Route’s **Status** changes to Historical, the **Status Date** changes to the current date and the **Make Active** ⚖️ icon replaces the **Make Historical** ⛑️ icon. To sort the Corporate Route List so all Historical Corporate Routes are moved to the bottom of the list, click on the **Status** column heading to sort the column.

<table>
<thead>
<tr>
<th></th>
<th>State Road</th>
<th>County</th>
<th>Year</th>
<th>Month</th>
<th>Day</th>
<th>Status</th>
<th>Date</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>State Road</td>
<td>Franklin</td>
<td>19</td>
<td>31</td>
<td>0</td>
<td>Historical</td>
<td>07/29/2010</td>
<td></td>
</tr>
</tbody>
</table>

**Making a Corporate Route Active**

To make the Corporate Route Active again, click on the **Make Active** ⚖️ icon next to the record to be made active.

A confirmation message displays. Click on the **OK** button to confirm the change or click on the **Cancel** button to exit without saving any changes.

The Corporate Route’s **Status** changes back to Active, the **Status Date** changes to the current date and the **Make Historical** ⛑️ icon replaces the **Make Active** ⚖️ icon.

<table>
<thead>
<tr>
<th></th>
<th>State Road</th>
<th>County</th>
<th>Year</th>
<th>Month</th>
<th>Day</th>
<th>Status</th>
<th>Date</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>State Road</td>
<td>Franklin</td>
<td>19</td>
<td>31</td>
<td>0</td>
<td>Active</td>
<td>07/29/2010</td>
<td></td>
</tr>
</tbody>
</table>

**County List**

The **County List** contains Indiana counties represented by unique numerical codes. The List may be used to select an additional county or counties for a project.

To maintain the list of Counties, select **County List** from the **Reference Data** menu.
From the **County List Panel**, Counties may be added, edited, or made historical or active.

Access to menu selections, icons and features is dependent on a User’s role and security level. For details, refer to *Understanding the Screen* in the Getting Started section.
Instructions for common functions such as Viewing Details, Applying Filters, Sorting, Showing More Items per Page, and Exporting to Microsoft Excel may be found in the Getting Started section.

Adding a County

To add a County, click on the Add New + icon to the right of the Status Date column heading.

In the ADD Screen Mode, enter information as needed.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.

Click the Save button to save the new record and return to the County List Panel or click on the Cancel button to exit without saving. If saving, click on the OK button at the confirmation message.
SPMS will not save the record or leave the **ADD Screen Mode** if a required field is left empty. Instead, a red asterisk (*) will appear to the right of the field and the cursor will blink inside the field.

SPMS does not allow duplicates. If the record already exists in the database, a message displays.

Once saved, the new County should be visible in the List. If not, click on the **Status Date** column heading twice to re-sort and refresh the List.

**Editing a County**

To edit a County, click on the **Edit** icon next to the record to be updated.

In the **EDIT Screen Mode**, update fields as needed.

Field values that are grayed out are auto-populated, and therefore **NON-EDITABLE**. Fields with a peach background are **REQUIRED**. Fields with no background color are **OPTIONAL**.
Click the Save button to save the record and return to the County List Panel or click on the Cancel button to exit without saving.

SPMS will not save the record or leave the EDIT Screen Mode if a required field is left empty. Instead, a red asterisk (*) will appear to the right of the field and the cursor will blink inside the field.

The changes should be visible in the List. If not, click on the Status Date column heading to re-sort and refresh the List.

Making a County Historical

The Status of a County is either Active or Historical (Inactive). The List of Counties may be sorted by Status to place all historical Counties at the bottom of the list. Historical Counties may be made Active again.

To make a County historical, click on the Make Historical icon next to the record to be made historical.

A confirmation message displays. Click on the OK button to confirm the change or click on the Cancel button to exit without saving any changes.
The County’s **Status** changes to Historical, the **Status Date** changes to the current date and the **Make Active** 🏭 icon replaces the **Make Historical** ⚡️ icon. To sort the County List so all Historical Counties are moved to the bottom of the list, click on the **Status** column heading to sort the column.

| 5 | Blackford | 9 | Historical | 07/28/2010 |

**Making a County Active**

To make the County Active again, click on the **Make Active** 🏭 icon next to the record to be made active.

A confirmation message displays. Click on the **OK** button to confirm the change or click on the **Cancel** button to exit without saving any changes.

![Message from webpage](image)

Are you sure you want to activate this record?

- **OK**
- **Cancel**

The County’s **Status** changes back to Active, the **Status Date** changes to the current date and the **Make Historical** ⚡️ icon replaces the **Make Active** 🏭 icon.

| 5 | Blackford | 9 | Active | 07/28/2010 |

**District List**

The **District List** contains a list of area boundaries consisting of one or more Indiana counties. Each District area is further broken down into smaller areas that are identified as sub-districts. A Federal Highway Administration (FHWA) identifier is assigned to each of the INDOT Districts. The Districts and sub-districts are represented by unique numerical codes.

To maintain the list of Districts, select **District List** from the **Reference Data** menu.
From the **District List Panel**, Districts may be added, edited, or made historical or active.

Access to menu selections, icons and features is dependent on a User’s role and security level. For details, refer to **Understanding the Screen** in the Getting Started section.
Instructions for common functions such as Viewing Details, Applying Filters, Sorting, Showing More Items per Page, and Exporting to Microsoft Excel may be found in the Getting Started section.

**Adding a District**

To add a District, click on the Add New icon to the right of the Status Date column heading.

In the **ADD Screen Mode**, enter information as needed.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.
Click the **Save** button to save the new record and return to the **District List Panel** or click on the **Cancel** button to exit without saving. If saving, click on the **OK** button at the confirmation message.

**New item has been added successfully.**
SPMS will not save the record or leave the ADD Screen Mode if a required field is left empty. Instead, a red asterisk (*) will appear to the right of the field and the cursor will blink inside the field.

SPMS does not allow duplicates. If the record already exists in the database, a message displays.

Once saved, the new District should be visible in the List. If not, click on the Status Date column heading twice to re-sort and refresh the List.

**Editing a District**

To edit a District, click on the Edit icon next to the record to be updated.

In the EDIT Screen Mode, update fields as needed.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.
Click the Save button to save the record and return to the District List Panel or click on the Cancel button to exit without saving.

SPMS will not save the record or leave the EDIT Screen Mode if a required field is left empty. Instead, a red asterisk (*) will appear to the right of the field and the cursor will blink inside the field.

The changes should be visible in the List. If not, click on the Status Date column heading to re-sort and refresh the List.

Making a District Historical

The Status of a District is either Active or Historical (Inactive). The List of Districts may be sorted by Status to place all historical Districts at the bottom of the list. Historical Districts may be made Active again.

To make a District historical, click on the Make Historical 🏡 icon next to the record to be made historical.

A confirmation message displays. Click on the OK button to confirm the change or click on the Cancel button to exit without saving any changes.
The District’s **Status** changes to Historical, the **Status Date** changes to the current date and the **Make Active** icon replaces the **Make Historical** icon. To sort the District List so all Historical Districts are moved to the bottom of the list, click on the **Status** column heading to sort the column.

| 30 | C0 | C2 | 612 | Crawfordsville Sub | Historical | 07/28/2010 | ☑️ |

### Making a District Active

To make the District Active again, click on the **Make Active** icon next to the record to be made active.

A confirmation message displays. Click on the **OK** button to confirm the change or click on the **Cancel** button to exit without saving any changes.

| 30 | C0 | C2 | 612 | Crawfordsville Sub | Active | 07/28/2010 | ☑️ |

### Fiscal Appropriation

The Fiscal Appropriation List contains funding types by fiscal year involved in INDOT Projects. The funding types are represented by unique numerical codes.

To maintain Fiscal Appropriations, select **Fiscal Appropriation** from the **Reference Data** menu.
From the **Fiscal Appropriation List Panel**, Fiscal Appropriations may be added, edited, or made historical or active.

Access to menu selections, icons and features is dependent on a User’s role and security level. For details, refer to *Understanding the Screen* in the Getting Started section.
Instructions for common functions such as Viewing Details, Applying Filters, Sorting, Showing More Items per Page, and Exporting to Microsoft Excel may be found in the Getting Started section.

**Filtering the Fiscal Appropriation Code List**

By default, a Filter is open and applied, displaying all Funding Programs in the current State Fiscal Year. To see the list of Funding Programs for a past or future fiscal year, type that year in the State Fiscal Year filter text box and press Enter or click on the Apply Filter icon. The List will update to reflect the selected year. When the fiscal year’s Appropriation Codes display in the Fiscal Appropriation Panel, they may be added, made historical or made active.

**Adding a Fiscal Appropriation Code**

To add a Fiscal Appropriation Code, click on the Add New icon to the right of the Status Date column heading.

In the ADD Screen Mode, enter information as needed.
Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.

Dropdown fields have an auto-complete feature. For example, click on the Appropriation Code dropdown arrow to the right of the field for a complete list of available Codes. The list is sorted by Code number. Typing any letter in a dropdown field navigates to the first value in the list that begins with that letter. For example, typing a “D” displays “D18 – ARRA Forest Highways”.

<table>
<thead>
<tr>
<th>Appropriation Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>434</td>
<td>Title V Research, Training &amp; Education</td>
</tr>
<tr>
<td>451</td>
<td>Special St (Cash)</td>
</tr>
<tr>
<td>45D</td>
<td>Section 1128 Demo</td>
</tr>
<tr>
<td>471</td>
<td>State Crossroads</td>
</tr>
<tr>
<td>503</td>
<td>Industrial Corr Safety</td>
</tr>
<tr>
<td>506</td>
<td>KY Br. Demo, Proj.</td>
</tr>
<tr>
<td>519</td>
<td>Highway Demo Projects</td>
</tr>
<tr>
<td>528</td>
<td>Highway Demo Projects</td>
</tr>
<tr>
<td>532</td>
<td>Maintenance 90.64</td>
</tr>
<tr>
<td>559</td>
<td>Gen Funds For Sur Trans</td>
</tr>
<tr>
<td>56A</td>
<td>Surf Trans Priorities</td>
</tr>
<tr>
<td>56C</td>
<td>Surface Trans Priorities</td>
</tr>
<tr>
<td>580</td>
<td>Interstate Substitution</td>
</tr>
<tr>
<td>594</td>
<td>St Infrastructure Bank</td>
</tr>
<tr>
<td>697</td>
<td>RR Relocation Demo Program</td>
</tr>
<tr>
<td>783</td>
<td>Maintenance/Work Program</td>
</tr>
<tr>
<td>803</td>
<td>Traffic 53.3</td>
</tr>
<tr>
<td>906</td>
<td>State Funds</td>
</tr>
<tr>
<td>92E</td>
<td>Trans &amp; Com Sys Pre Pilot</td>
</tr>
<tr>
<td>9BA</td>
<td>Covered Bridge Funds</td>
</tr>
<tr>
<td>A14</td>
<td>Consolidated Primary-G</td>
</tr>
<tr>
<td>BRF</td>
<td>Bridge Funds</td>
</tr>
<tr>
<td>BRS</td>
<td>Bridge Replacement Special</td>
</tr>
<tr>
<td>C20</td>
<td>ARRA Areas with Pop &lt;200K</td>
</tr>
<tr>
<td>C22</td>
<td>ARRA Transportation Enhance</td>
</tr>
<tr>
<td>C23</td>
<td>ARRA Urbanized Areas &gt;200K</td>
</tr>
<tr>
<td>C24</td>
<td>ARRA Avail for All Area (Flex)</td>
</tr>
<tr>
<td>C25</td>
<td>ARRA Rural Pop &lt;5K</td>
</tr>
<tr>
<td>CMQ</td>
<td>- Quality Air Control</td>
</tr>
</tbody>
</table>

Click the **Save** button to save the new record and return to the Fiscal Appropriation Panel or click on the **Cancel** button to exit without saving. If saving, click on the **OK** button at the confirmation message.
SPMS will not save the record or leave the **ADD Screen Mode** if a required field is left empty. Instead, a red asterisk (*) will appear to the right of the field. The cursor will blink inside text fields while dropdown fields will be highlighted.

SPMS does not allow duplicates. If the record already exists in the database, a message displays.

Once saved, the new Fiscal Appropriation Code should be visible in the List. If not, click on the **Status Date** column heading twice to re-sort and refresh the List.

**Making a Fiscal Appropriation Code Historical**

The Status of a Fiscal Appropriation Code is either Active or Historical (Inactive). The List of Fiscal Appropriation Codes may be sorted by Status to place all historical Codes at the bottom of the list. Historical Fiscal Appropriation Codes may be made Active again.

To make a Fiscal Appropriation Code historical, click on the **Make Historical** icon next to the record to be made historical.

A confirmation message displays. Click on the **OK** button to confirm the change or click on the **Cancel** button to exit without saving any changes.
The Fiscal Appropriation Code’s Status changes to Historical, the Status Date changes to the current date and the Make Active icon replaces the Make Historical icon. To sort the Fiscal Appropriation Code List so all Historical Codes are moved to the bottom of the list, click on the Status column heading to sort the column.

### Making a Fiscal Appropriation Code Active

To make the Fiscal Appropriation Code Active again, click on the Make Active icon next to the record to be made active.

A confirmation message displays. Click on the OK button to confirm the change or click on the Cancel button to exit without saving any changes.

The Fiscal Appropriation Code’s Status changes back to Active, the Status Date changes to the current date and the Make Historical icon replaces the Make Active icon.

### Fiscal Budget List

The Fiscal Budget List contains budgeted annual operating expenses by financial year, Funding Program and Project phase.

To maintain the list of Fiscal Budget Funding Programs, select Fiscal Budget List from the Reference Data menu.
From the **Fiscal Budget List Panel**, Fiscal Budget Programs may be added, edited, or made historical or active.

Access to menu selections, icons and features is dependent on a User’s role and security level. For details, refer to **Understanding the Screen** in the Getting Started section.
Instructions for common functions such as Viewing Details, Applying Filters, Sorting, Showing More Items per Page, and Exporting to Microsoft Excel may be found in the Getting Started section.

Filtering the Fiscal Budget List

By default, a Filter is open and applied, displaying all Fiscal Budget Funding Programs in the current State Fiscal Year. To see the list of Fiscal Budget Funding Programs for a past or future fiscal year, type that year in the State Fiscal Year filter text box and press Enter or click on the Apply Filter icon. The List will update to reflect the selected year. When the Funding Programs displays in the Fiscal Budget List Panel, they may be added, made historical or made active.

Adding a Fiscal Budget Funding Program

To add a Fiscal Budget Funding Program, click on the Add New icon to the right of the Status Date column heading.

In the ADD Screen Mode, enter information as needed.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.
Dropdown fields have an auto-complete feature. For example, click on the Funding Program dropdown arrows to the right of the fields for complete lists of available Funding Programs. Typing any letter in a dropdown field navigates to the first value in the list that begins with that letter. For example, typing an “R” in the Funding Program dropdown list displays “Railroad Safety – Construction”.

Click the Save button to save the new record and return to the Fiscal Budget List Panel or click on the Cancel button to exit without saving. If saving, click on the OK button at the confirmation message.
SPMS will not save the record or leave the **ADD Screen Mode** if a required field is left empty. Instead, a red asterisk (*) will appear to the right of the field. The cursor will blink inside text fields while dropdown fields will be highlighted.

SPMS does not allow duplicates. If the record already exists in the database, a message displays.

Once saved, the new Fiscal Budget Funding Program should be visible in the List. If not, click on the **Status Date** column heading twice to re-sort and refresh the List.

**Editing a Fiscal Budget Funding Program**

To edit a Fiscal Budget Funding Program, click on the **Edit** icon next to the record to be updated.

In the **EDIT Screen Mode**, update the **Funding Amount** as needed.

Field values that are grayed out are auto-populated, and therefore **NON-EDITABLE.** Fields with a peach background are **REQUIRED.** Fields with no background color are **OPTIONAL.**
Click the **Save** button to save the record and return to the **Fiscal Budget List Panel** or click on the **Cancel** button to exit without saving.

SPMS will not save the record or leave the **EDIT Screen Mode** if a required field is left empty. Instead, a red **asterisk** (*) will appear to the right of the field. The cursor will blink inside text fields while dropdown fields will be highlighted.

The changes should be visible in the List. If not, click on the **Status Date** column heading to re-sort and refresh the List.

### Making a Fiscal Budget Funding Program Historical

The Status of a Fiscal Budget Funding Program is either Active or Historical (Inactive). The List of Fiscal Budget Funding Programs may be sorted by Status to place all historical Programs at the bottom of the list. Historical Fiscal Budget Funding Programs may be made Active again.

To make a Fiscal Budget Funding Program historical, click on the **Make Historical** icon next to the record to be made historical.

A confirmation message displays. Click on the **OK** button to confirm the change or click on the **Cancel** button to exit without saving any changes.
The Fiscal Budget Funding Program’s **Status** changes to Historical, the **Status Date** changes to the current date and the **Make Active** icon replaces the **Make Historical** icon. To sort the Fiscal Budget List so all Historical Funding Programs are moved to the bottom of the list, click on the **Status** column heading to sort the column.

| 2011 | 301L | HES-Penalty Local | UT2 | Utilities CN | $0.00 | Historical | 07/26/2010 |

**Making a Fiscal Budget Funding Program Active**

To make the Fiscal Budget Funding Program Active again, click on the **Make Active** icon next to the record to be made active.

A confirmation message displays. Click on the **OK** button to confirm the change or click on the **Cancel** button to exit without saving any changes.

![Message from webpage]

Are you sure you want to activate this record?

[OK] [Cancel]

The Fiscal Budget Funding Program’s **Status** changes back to Active, the **Status Date** changes to the current date and the **Make Historical** icon replaces the **Make Active** icon.

| 2011 | 301L | HES-Penalty Local | UT2 | Utilities CN | $0.00 | Active | 07/26/2010 |

**Route Type List**

The **Route Types List** displays a name and acronym for each type of route. The **Corporate Route**, **Editable Route #**, **Add from Lookup**, and **AKA Routes Enabled** fields determine whether modifications related to those fields can be made to a route.

To maintain the list, select **Route Type List** from the **Reference Data** menu.
From the **Route Type List Panel**, Route Types may be added, edited, or made historical or active.

Access to menu selections, icons and features is dependent on a User’s role and security level. For details, refer to **Understanding the Screen** in the Getting Started section.
Instructions for common functions such as Viewing Details, Applying Filters, Sorting, Showing More Items per Page, and Exporting to Microsoft Excel may be found in the Getting Started section.

Adding a Route Type

To add a Route Type, click on the Add New + icon to the right of the Status Date column heading.

In the ADD Screen Mode, enter information as needed.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.
Click the **Save** button to save the new record and return to the **Route Type List Panel** or click on the **Cancel** button to exit without saving. If saving, click on the **OK** button at the confirmation message.

SPMS will not save the record or leave the **ADD Screen Mode** if a required field is left empty. Instead, a red **asterisk (**) will appear to the right of the field. The cursor will blink inside text fields while dropdown fields will be highlighted.

SPMS does not allow duplicates. If the record already exists in the database, a message displays.

Once saved, the new Route Type should be visible in the List. If not, click on the **Status Date** column heading twice to re-sort and refresh the List.

**Editing a Route Type**

To edit a Route Type, click on the **Edit** icon next to the record to be updated.

In the **EDIT Screen Mode**, update fields as needed.

Field values that are grayed out are auto-populated, and therefore **NON-EDITABLE**. Fields with a peach background are **REQUIRED**. Fields with no background color are **OPTIONAL**.
Click the **Save** button to save the record and return to the Route Type List Panel or click on the **Cancel** button to exit without saving.

SPMS will not save the record or leave the **EDIT Screen Mode** if a required field is left empty. Instead, a red asterisk (*) will appear to the right of the field. The cursor will blink inside text fields while dropdown fields will be highlighted.

The changes should be visible in the List. If not, click on the **Status Date** column heading to re-sort and refresh the List.

### Making a Route Type Historical

The Status of a Route Type is either Active or Historical (Inactive). The List of Route Types may be sorted by Status to place all historical Types at the bottom of the list. Historical Route Types may be made Active again.

To make a Route Type historical, click on the **Make Historical** icon next to the record to be made historical.

A confirmation message displays. Click on the **OK** button to confirm the change or click on the **Cancel** button to exit without saving any changes.
The Route Type’s Status changes to Historical, the Status Date changes to the current date and the Make Active icon replaces the Make Historical icon. To sort the Route Type List so all Historical Route Types are moved to the bottom of the list, click on the Status column heading to sort the column.

### Making a Route Type Active

To make the Route Type Active again, click on the Make Active icon next to the record to be made active.

A confirmation message displays. Click on the OK button to confirm the change or click on the Cancel button to exit without saving any changes.

The Route Type’s Status changes back to Active, the Status Date changes to the current date and the Make Historical icon replaces the Make Active icon.

### Special Route List

The Special Routes List contains routes designated as City Streets, County Roads, Proposed Routes, Realignments, Special State Road, Miscellaneous and Various Route types. Routes involved in a Project that are not Corporate Routes must exist in or be added to the Special Route List.

Routes with a route type of Interstate, U.S. Highway, and State Road are defined in the Corporate Route List.

To maintain the list, select Special Route List from the Reference Data menu.
From the **Special Route List Panel**, Special Routes may be added, edited, or made historical or active.

Access to menu selections, icons and features is dependent on a User’s role and security level. For details, refer to **Understanding the Screen** in the Getting Started section.
Instructions for common functions such as Viewing Details, Applying Filters, Sorting, Showing More Items per Page, and Exporting to Microsoft Excel may be found in the Getting Started section.

Adding a Special Route

To add a Special Route, click on the Add New icon to the right of the Status Date column heading.

In the ADD Screen Mode, enter information as needed.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.

Dropdown fields have an auto-complete feature. For example, click on the Route Type dropdown arrow to the right of the field for a complete list of available Route Types. The list is sorted alphabetically. Typing
any letter in a dropdown field navigates to the first value in the list that begins with that letter. For example, typing a “C” in the Route Type dropdown list displays “City Street”.

<table>
<thead>
<tr>
<th>Route Type</th>
<th>City Street</th>
</tr>
</thead>
</table>

If Route Type is County Road, City Streets, or Various Route Types, Route Number is auto-populated with the next available Route Number for the selected County.

Click the Save button to save the new record and return to the Special Route List Panel or click on the Cancel button to exit without saving. If saving, click on the OK button at the confirmation message.
SPMS will not save the record or leave the **ADD Screen Mode** if a required field is left empty. Instead, a red **asterisk** (*) will appear to the right of the field. The cursor will blink inside text fields while dropdown fields will be highlighted.

```
<table>
<thead>
<tr>
<th>Route Type</th>
<th>*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Route Number</td>
<td>*</td>
</tr>
</tbody>
</table>
```

SPMS does not allow duplicates. If the record already exists in the database, a message displays.

```
Message

Record already exists

OK
```

Once saved, the new Special Route should be visible in the List. If not, click on the **Status Date** column heading twice to re-sort and refresh the List.

**Editing a Special Route**

To edit a Special Route, click on the **Edit** icon next to the record to be updated.

In the **EDIT Screen Mode**, update fields as needed.

Field values that are grayed out are auto-populated, and therefore **NON-EDITABLE**. Fields with a peach background are **REQUIRED**. Fields with no background color are **OPTIONAL**.
Click the **Save** button to save the record and return to the **Special Route List Panel** or click on the **Cancel** button to exit without saving.

SPMS will not save the record or leave the **EDIT Screen Mode** if a required field is left empty. Instead, a red **asterisk (\*)** will appear to the right of the field and the cursor will blink inside the field.

The changes should be visible in the List. If not, click on the **Status Date** column heading to re-sort and refresh the List.

### Making a Special Route Historical

The Status of a Special Route is either Active or Historical (Inactive). The List of Special Routes may be sorted by Status to place all historical Routes at the bottom of the list. Historical Special Routes may be made Active again.

To make a Special Route historical, click on the **Make Historical** 🗡️ icon next to the record to be made historical.

A confirmation message displays. Click on the **OK** button to confirm the change or click on the **Cancel** button to exit without saving any changes.
The Special Route's Status changes to Historical, the Status Date changes to the current date and the Make Active icon replaces the Make Historical icon. To sort the Special Routes List so all Historical Routes are moved to the bottom of the list, click on the Status column heading to sort the column.

<table>
<thead>
<tr>
<th></th>
<th>City Street</th>
<th></th>
<th>St Joseph</th>
<th></th>
<th>Historical</th>
<th>07/28/2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Making a Special Route Active**

To make the Special Route Active again, click on the Make Active icon next to the record to be made active.

A confirmation message displays. Click on the OK button to confirm the change or click on the Cancel button to exit without saving any changes.

The Special Route's Status changes back to Active, the Status Date changes to the current date and the Make Historical icon replaces the Make Active icon.

<table>
<thead>
<tr>
<th></th>
<th>City Street</th>
<th></th>
<th>St Joseph</th>
<th></th>
<th>Active</th>
<th>07/28/2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Template List**

The Template List contains a master list of SPMS Project templates.

To maintain the list of Templates, select Template List from the Reference Data menu.
From the **Template List Panel**, Templates may be added, edited, or made historical or active.

Access to menu selections, icons and features is dependent on a User's role and security level. For details, refer to *Understanding the Screen* in the Getting Started section.
Instructions for common functions such as Viewing Details, Applying Filters, Sorting, Showing More Items per Page, and Exporting to Microsoft Excel may be found in the Getting Started section.

Adding a Template

To add a Template, click on the Add New icon to the right of the Status column heading.

In the ADD Screen Mode, enter information as needed. Template ID has a value of [NEW] until the record is saved and SPMS assigns a unique Template ID.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.
Click on the **Save** button to save the new record and return to the **Template List Panel** or click on the **Cancel** button to exit without saving. If saving, click on the **OK** button at the confirmation message.

SPMS will not save the record or leave the **ADD Screen Mode** if a required field is left empty. Instead, a red *asterisk* (*) will appear to the right of the field and the cursor will blink inside the field.

Once saved, the new Template should be visible in the List. If not, click on the **Template ID** column heading twice to re-sort and refresh the List or use the **Filter** feature to locate the new record.

### Editing a Template

To edit a Template, click on the **Edit** icon next to the record to be updated.

In the **EDIT Screen Mode**, update fields as needed.

Field values that are grayed out are auto-populated, and therefore **NON-EDITABLE**. Fields with a peach background are **REQUIRED**, Fields with no background color are **OPTIONAL**.
Click the **Save** button to save the record and return to the **Template List Panel** or click on the **Cancel** button to exit without saving.

SPMS will not save the record or leave the **EDIT Screen Mode** if a required field is left empty. Instead, a red **asterisk (**) will appear to the right of the field and the cursor will blink inside the field.

The changes should be visible in the List. If not, click on the **Template ID** column heading to re-sort and refresh the List or use the **Filter** feature to locate the new record.

### Making a Template Historical

The Status of a Template is either **Active** or **Historical** (Inactive). The List of Templates may be filtered to display only Active templates by placing a checkmark in the checkbox above the Panel.

To make a Template historical, click on the **Make Historical** icon next to the record to be made historical.

A confirmation message displays. Click on the **OK** button to confirm the change or click on the **Cancel** button to exit without saving any changes.
The Template’s Status changes to Historical and the Make Active icon replaces the Make Historical icon. To sort the Template List so all Historical Templates are moved to the bottom of the list, click on the Status column heading to sort the column.

|   | Greenfield District - New Railroad Template | Historical |

**Making a Template Active**

To make the Template Active again, click on the Make Active icon next to the record to be made active.

A confirmation message displays. Click on the OK button to confirm the change or click on the Cancel button to exit without saving any changes.

The Template’s Status changes back to Active and the Make Historical icon replaces the Make Active icon.

|   | Greenfield District - New Railroad Template | Active |

**Adding a Template Type**

Each Template may have multiple Template Types. To view and maintain Template Types for a Template click on the Template Type List icon the right of the Status column heading.

To add a Template Type Code, click on the Add New icon to the right of the Sort Sequence column heading.
In the **ADD Screen Mode**, enter information as needed.

Field values that are grayed out are auto-populated, and therefore **NON-EDITABLE**. Fields with a peach background are **REQUIRED**. Fields with no background color are **OPTIONAL**.

Click the **Save** button to save the new record and return to the Template Type Code List Panel or click on the **Cancel** button to exit without saving. If saving, click on the **OK** button at the confirmation message.
SPMS will not save the record or leave the ADD Screen Mode if a required field is left empty. Instead, a red asterisk (*) will appear to the right of the field and the cursor will blink inside the field.

Once saved, the new Template Type Code should be visible in the List. If not, click on the Template Type Code column heading twice to re-sort and refresh the List or use the Filter feature to locate the new record.

Editing a Template Type

Each Template may have multiple Template Types. To view and maintain Template Types for a Template click on the Template Type List icon to the right of the Status column heading.

To edit a Template Type Code, click on the Edit icon next to the record to be updated.

In the EDIT Screen Mode, update fields as needed.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.

Click the Save button to save the record and return to the Template Type Code List Panel or click on the Cancel button to exit without saving.

SPMS will not save the record or leave the EDIT Screen Mode if a required field is left empty. Instead, a red asterisk (*) will appear to the right of the field and the cursor will blink inside the field.

The changes should be visible in the List. If not, click on the Template Type Code column heading to re-sort and refresh the List or use the Filter feature to locate the new record.
Deleting a Template Type

Each Template may have multiple Template Types. To view and maintain Template Types for a Template click on the Template Type List icon to the right of the Status column heading.

To delete a Template Type, click on the Delete icon next to the record to be removed.

A confirmation message displays. Click on the OK button to confirm the deletion or click on the Cancel button to exit without saving any changes.

The Template Type is removed from the list.

Adding a Template Activity

Each Template may have multiple Template Activities assigned. A Template’s Activities may be added, edited, assigned a predecessor and deleted. To view and maintain the Template Activities List for a Template, click on the Template Activity List icon to the right of the Default Selected column heading.

To add a Template Activity, click on the Add New icon to the right of the Default Selected column heading.

In the ADD Screen Mode, enter information as needed.
Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Screen Mode: ADD</td>
<td></td>
</tr>
<tr>
<td>Activity Seq</td>
<td>[NEW]</td>
</tr>
<tr>
<td>Code</td>
<td></td>
</tr>
<tr>
<td>Sort Seq</td>
<td></td>
</tr>
<tr>
<td>Activity Required</td>
<td></td>
</tr>
<tr>
<td>Default Selected</td>
<td></td>
</tr>
<tr>
<td>Position Seq Default to Selected Activity</td>
<td>✓</td>
</tr>
</tbody>
</table>

Dropdown fields have an auto-complete feature. For example, click on the Code dropdown arrow to the right of the field for a complete list of available Activity Codes. Typing a letter in the dropdown field navigates to the first value in the list that begins with that letter. For example, typing a “P” displays “Pavement Design”.
Click the **Save** button to save the new record and return to the Template Activity List Panel or click on the **Cancel** button to exit without saving. If saving, click on the **OK** button at the confirmation message.

SPMS will not save the record or leave the **ADD Screen Mode** if a required field is left empty. Instead, a red asterisk (*) will appear to the right of the field and the cursor will blink inside the field.
Once saved, the new Template Activity should be visible in the List. If not, click on the Activity Sequence column heading twice to re-sort and refresh the List or use the Filter feature to locate the new record.

**Editing a Template Activity**

Each Template may have multiple Template Activities assigned. A Template’s Activities may be added, edited, assigned a predecessor and deleted. To view and maintain the Template Activities List for a Template, click on the Template Activity List icon to the right of the Default Selected column heading.

To edit a Template Activity, click on the Edit icon next to the record to be updated.

In the **EDIT Screen Mode**, update fields as needed.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.

Click the **Save** button to save the record and return to the Template Activity List Panel or click on the **Cancel** button to exit without saving.

SPMS will not save the record or leave the **EDIT Screen Mode** if a required field is left empty. Instead, a red asterisk (*) will appear to the right of the field and the cursor will blink inside the field.
The changes should be visible in the List. If not, click on the Activity Sequence column heading to re-sort and refresh the List or use the Filter feature to locate the new record.

Deleting a Template Activity

Each Template may have multiple Template Activities assigned. A Template’s Activities may be added, edited, assigned a predecessor and deleted. To view and maintain the Template Activities List for a Template, click on the Template Activity List icon to the right of the Default Selected column heading.

To delete a Template Activity, click on the Delete icon next to the record to be removed.

A message displays if the Activity has any existing Predecessors or Successors that must be removed first. Click on the OK button and remove the Predecessors/Successors as needed by moving Predecessors in the right column to the left column.

Selecting Predecessors

Each Template may have multiple Template Activities assigned. A Template’s Activities may be added, edited, assigned a predecessor and deleted. To view and maintain the Template Activities List for a Template, click on the Template Activity List icon to the right of the Default Selected column heading.

To select Predecessors, click on the Predecessor List icon next to the record to be updated.

The Panel displays a list of available Predecessors and a list of selected Predecessors. Click on the Predecessor in the list to select it and use the double arrow buttons to move it from one list to the other. The CTRL-click and SHIFT-click shortcut keys may be used to select multiple items.
060 Start Plan Development Predecessors

<table>
<thead>
<tr>
<th>Available Predecessors</th>
<th>Selected Predecessors</th>
</tr>
</thead>
<tbody>
<tr>
<td>125 ~ Plans To R/W</td>
<td>005 ~ Project Authorized</td>
</tr>
<tr>
<td>175 ~ R/W Clear</td>
<td></td>
</tr>
</tbody>
</table>

Click on the Close button to save the changes and return to the Template Activity Panel.

**Template Type Code List**

The Template Type Code List contains a master list of SPMS Project Template Type Codes.

To maintain the list of Template Type Codes, select Template Type Code List from the Reference Data menu.
From the **Template Type Code List Panel**, Template Type Codes may be added, edited, or made historical or active.

Access to menu selections, icons and features is dependent on a User's role and security level. For details, refer to [Understanding the Screen](#) in the Getting Started section.
Instructions for common functions such as Viewing Details, Applying Filters, Sorting, Showing More Items per Page, and Exporting to Microsoft Excel may be found in the Getting Started section.

### Adding a Template Type Code

To add a Template Type Code, click on the Add New icon to the right of the Status column heading.

In the **ADD Screen Mode**, enter information as needed.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.

Click the **Save** button to save the new record and return to the Template Type Code List Panel or click on the **Cancel** button to exit without saving. If saving, click on the **OK** button at the confirmation message.
SPMS will not save the record or leave the ADD Screen Mode if a required field is left empty. Instead, a red asterisk (*) will appear to the right of the field and the cursor will blink inside the field.

Once saved, the new Template Type Code should be visible in the List. If not, click on the Template Type Code column heading twice to re-sort and refresh the List or use the Filter feature to locate the new record.

Editing a Template Type Code

To edit a Template Type Code, click on the Edit icon next to the record to be updated.

In the EDIT Screen Mode, update fields as needed.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.

Click the Save button to save the record and return to the Template Type Code List Panel or click on the Cancel button to exit without saving.
SPMS will not save the record or leave the **EDIT Screen Mode** if a required field is left empty. Instead, a red asterisk (*) will appear to the right of the field and the cursor will blink inside the field.

The changes should be visible in the List. If not, click on the **Template Type Code** column heading to re-sort and refresh the List or use the **Filter** feature to locate the new record.

### Making a Template Type Code Historical

The Status of a Template Type Code is either Active or Historical (Inactive). The List of Template Type Codes may be sorted by Status to place all historical Template Type Codes at the bottom of the list. Historical Template Type Codes may be made Active again.

To make a Template Type Code historical, click on the **Make Historical** icon next to the record to be made historical.

A confirmation message displays. Click on the **OK** button to confirm the change or click on the **Cancel** button to exit without saving any changes.

The Template Type Code’s **Status** changes to Historical and the **Make Active** icon replaces the **Make Historical** icon. To sort the Template Type Code List so all Historical Template Type Codes are moved to the bottom of the list, click on the **Status** column heading to sort the column.

### Making a Template Type Code Active

To make the Template Type Code Active again, click on the **Make Active** icon next to the record to be made active.

A confirmation message displays. Click on the **OK** button to confirm the change or click on the **Cancel** button to exit without saving any changes.
The Template Type Code’s **Status** changes back to Active and the **Make Historical** icon replaces the **Make Active** icon.

<table>
<thead>
<tr>
<th>Template Type Code</th>
<th>Description</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>C</td>
<td>Miscellaneous</td>
<td>Active</td>
</tr>
<tr>
<td>D</td>
<td>District</td>
<td>Historical</td>
</tr>
<tr>
<td>L</td>
<td>Local</td>
<td>Historical</td>
</tr>
<tr>
<td>LC</td>
<td>Local - Crawfordsville</td>
<td>Active</td>
</tr>
<tr>
<td>LF</td>
<td>Local - Ft. Wayne</td>
<td>Active</td>
</tr>
<tr>
<td>LG</td>
<td>Local - Greenfield</td>
<td>Active</td>
</tr>
<tr>
<td>LL</td>
<td>Local - LaPorte</td>
<td>Active</td>
</tr>
<tr>
<td>LS</td>
<td>Local - Seymour</td>
<td>Active</td>
</tr>
<tr>
<td>LV</td>
<td>Local - Vincennes</td>
<td>Active</td>
</tr>
<tr>
<td>M</td>
<td>Maintenance</td>
<td>Active</td>
</tr>
</tbody>
</table>

**Viewing the Template List**

Click on the **Template List** icon to the right of the record.

A Panel displays the Template list, as shown below. Click on the **Close** button to return to the **Template Type Codes Panel**.
Update Corporate Bridge

An SPMS Project may involve maintaining a bridge, replacing a bridge or building a new bridge. The SPMS Corporate Bridge List is used to select a bridge to maintain or a bridge to replace. When building a new bridge, the bridge is not added to the Corporate Bridge List until the work is completed. When maintaining or replacing a bridge, the record is not updated in the Corporate Bridge List until the work is completed.

The Update Corporate Bridge List contains Bridges that have been identified in a Project as needing maintenance, replacement and also new bridge construction. Additionally, if a Project has a work type identified as bridge work and no bridge was selected for the Project, an entry is made to the Update Corporate Bridge List as a flag to the Bridge section to notify the Project Engineer to select or add a bridge to the Project.

To view and maintain bridge in the list, select Update Corporate Bridge from the Reference Data menu to view and maintain bridges in the list.
Access to menu selections, icons and features is dependent on a User’s role and security level. For details, refer to Understanding the Screen in the Getting Started section.

The **Update Corporate Bridge Panel** displays all Projects with the following Bridge Flags:

- N = New
- R = Replace
- E = Maintain
- X = Missing Bridge Information*

*Missing Bridge Information means that a Work Type related to Bridges has been selected for the Project but no Bridge information has been added.

Field values that are grayed out are auto-populated, and therefore **NON-EDITABLE**. Fields with a peach background are **REQUIRED**. Fields with no background color are **OPTIONAL**.
Instructions for common functions such as Viewing Details, Applying Filters, Sorting, Showing More Items per Page, and Exporting to Microsoft Excel may be found in the Getting Started section.

The column to the right of Contract Award Status displays an Assign NBI icon, an Update Corporate Bridge icon, or no icon if the bridge work is not ready to be added to or updated in the Corporate Bridge List.

**Assign NBI**

Click on the Assign NBI icon to display the Assign NBI Number Panel. Enter an NBI number and click on the Assign NBI button to update the Corporate Bridge List and to remove the record from the Update Corporate Bridge List.

Click on the Close button to take no action on this record at this time.
Update Corporate Bridge

Click on the Update Corporate Bridge icon to display the Update Corporate Bridge NBI Panel and the Proposed Structure and Proposed Inspection Final Acceptance Panel.

The Update Corporate Bridge NBI Panel contains existing Bridge data and Existing Structure information.

The Proposed Structure and Proposed Inspection Final Acceptance Panel displays information pertaining to the work performed on the Bridge. An Update, Remove and Close button are provided.

Click on the Update button to add the information to the Corporate Bridge list and remove the record from the Update Corporate Bridge list.

Click on the Remove button and click on the OK or Cancel button to respond to the Confirmation message. If OK was clicked the record is removed from the Update Corporate Bridge List. This action does not update the Corporate Bridge List.

Click on the Close button to take no action on this record at this time.
System Maintenance

Announcements
Announcements Panel is comprised of Effective Date, Announcement Text, Status, and Status Date.

**Adding a Announcement**

To add an Announcement, Click on Add New icon to the right of the Status Date column heading.

In the **ADD Screen Mode**, enter information as needed.

```plaintext
Select Effective Date from the Calendar and write announcement in area provided; click Save or click on the Cancel button to exit without saving any changes.
```

**Editing an Announcement**

Click on Edit icon to access Screen Mode: Edit.

In the **EDIT Screen Mode**, update fields as needed.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.
Make changes to Effective Date or Announcement Text; click Save or click on the Cancel button to exit without saving any changes.

**Making an Announcement Historical**

To make historical, click on the Make Historical icon next to the record to be made historical to access Confirm Historical. Click OK to make record Historical or click on the Cancel button to exit without saving any changes.

**Contact List**

The Contact List contains names, addresses, phone numbers, and other relevant information for the state and city agencies, companies, consultants, and contractors with whom INDOT interacts. Contacts do not always require SPMS User IDs, but where one is required, a Contact must be added to this list first.

To maintain the list, select Contact List from the System Maintenance menu.
From the **Contact List Panel**, Contacts may be added, edited, or made historical or active.

Access to menu selections, icons and features is dependent on a User’s role and security level. For details, refer to **Understanding the Screen** in the Getting Started section.

Instructions for common functions such as **Viewing Details, Applying Filters, Sorting, Showing More Items per Page**, and **Exporting to Microsoft Excel** may be found in the Getting Started section.
Adding a Contact

To add a Contact, click on the **Add New** icon to the right of the **Organization Type** column heading.

In the **ADD Screen Mode**, click in either the Internal (Employee) or External (Contractor) Contact Type radio button and enter information as needed.

**A Contact ID** is assigned by SPMS for external Contacts. The Contact’s PeopleSoft ID should be entered for internal Contacts.

Field values that are grayed out are auto-populated, and therefore **NON-EDITABLE**. Fields with a peach background are **REQUIRED**. Fields with no background color are **OPTIONAL**.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact Type:</td>
<td><strong>Internal</strong> <strong>External</strong></td>
</tr>
<tr>
<td>Contact ID:</td>
<td>[New]</td>
</tr>
<tr>
<td>First Name:</td>
<td></td>
</tr>
<tr>
<td>Last Name:</td>
<td></td>
</tr>
<tr>
<td>Email:</td>
<td></td>
</tr>
<tr>
<td>Phone:</td>
<td></td>
</tr>
<tr>
<td>Alt Phone:</td>
<td></td>
</tr>
<tr>
<td>Fax:</td>
<td></td>
</tr>
<tr>
<td>Class Code:</td>
<td></td>
</tr>
<tr>
<td>MailStop:</td>
<td></td>
</tr>
</tbody>
</table>

Click the **Save** button to save the new record and return to the **Contact List Panel** or click on the **Cancel** button to exit without saving. If saving, click on the **OK** button at the confirmation message.
SPMS will not save the record or leave the **ADD Screen Mode** if a required field is left empty. Instead, a red **asterisk** (*) will appear to the right of the field and the cursor will blink inside the field.

SPMS does not allow duplicates. If the record already exists in the database, a message displays.

Once saved, the new Contact should be visible in the List. If not, click on the **Status Date** column heading twice to re-sort and refresh the List.

**Editing a Contact**

To edit a Contact, click on the **Edit** icon next to the record to be updated.

In the **EDIT Screen Mode**, update fields as needed.

Field values that are grayed out are auto-populated, and therefore **NON-EDITABLE**. Fields with a peach background are **REQUIRED**. Fields with no background color are **OPTIONAL**.
Click the Save button to save the record and return to the Contact List Panel or click on the Cancel button to exit without saving.

SPMS will not save the record or leave the EDIT Screen Mode if a required field is left empty. Instead, a red asterisk (*) will appear to the right of the field and the cursor will blink inside the field.

The changes should be visible in the List. If not, click on the Status Date column heading to re-sort and refresh the List.

**Making a Contact Historical**

The Status of a Contact is either Active or Historical (Inactive). Historical Contacts do not appear in SPMS dropdown lists. The List of Contacts may be sorted by Status to place all historical Contacts at the bottom of the list. Historical Contacts may be made Active again.

To make a Contact historical, click on the Make Historical 🏛 icon next to the record to be made historical.
A confirmation message displays. Click on the **OK** button to confirm the change or click on the **Cancel** button to exit without saving any changes.

![Message from webpage]

The Contact's **Status** changes to Historical and the **Make Active** icon replaces the **Make Historical** icon. To sort the Contact List so all Historical Contacts are moved to the bottom of the list, click on the **Status** column heading to sort the column.

<table>
<thead>
<tr>
<th>Abrams, Lisa</th>
<th>Historical 10/009113</th>
<th>Theobald, Phillip - 10/009051</th>
<th>Greenfield District (065149)</th>
<th>INDOT - Greenfield Sub (103433)</th>
<th>Departments</th>
</tr>
</thead>
</table>

**Making a Contact Active**

To make the Contact Active again, click on the **Make Active** icon next to the record to be made active.

A confirmation message displays. Click on the **OK** button to confirm the change or click on the **Cancel** button to exit without saving any changes.

![Message from webpage]

The Contact's **Status** changes back to Active and the **Make Historical** icon replaces the **Make Active** icon.

<table>
<thead>
<tr>
<th>Abrams, Lisa</th>
<th>Active 10/009113</th>
<th>Theobald, Phillip - 10/009051</th>
<th>Greenfield District (065149)</th>
<th>INDOT - Greenfield Sub (103433)</th>
<th>Departments</th>
</tr>
</thead>
</table>

**Organization List**

The **Organization List** contains positions, names, addresses, phone numbers, and other relevant information for the internal departments, state and city agencies, companies, consultants, and contractors with whom INDOT interacts.

To maintain the list, select **Organization List** from the **System Maintenance** menu.
From the **Organization List Panel**, organizations and their positions, addresses, and contacts may be maintained.

Access to menu selections, icons and features is dependent on a User's role and security level. For details, refer to [Understanding the Screen](#) in the Getting Started section.

### Displaying or Searching for a Contact, Division, Position Type or Organization

The **Organization Maintenance Panel** contains a directory tree with two top level folders for internal (INDOT Internal) and external (SPMS Other) **ACTIVE** organizations. A folder may be expanded by clicking on the maximize button to the left of each folder name. Click on the Organization's folder name to display its details in the Details, Contents, Address, and Positions Tabs below the **Organization Maintenance Panel**.

In the example below, Bartholomew County is selected by expanding the SPMS Other and the Indiana Counties folders.
The Search Panel may be used to find an organization by its Name or Organization Number, Division Name, Position Types within the organization, or Contact Names or Contact IDs of persons working in the organization.

Instructions for common functions such as Viewing Details, Applying Filters, Sorting, Showing More Items per Page, and Exporting to Microsoft Excel may be found in the Getting Started section.

In the example below, a search is being done to find all organizations containing Position Type = Program Managers.

Click in the radio button to the left of Position Type to select it, and then type “program manager” in the text box to the right of the empty dropdown list. Note: When searching for an Organization, it is only necessary to type the Organization’s Name or Number into the text box. SPMS returns all matching results in the Search Results Panel.
To perform the search above, click on the Search icon. Then, click on the arrow to the right of the dropdown list to display available Program Managers.

Locate the Program Manager’s name and click to select it. Any Organization with which the Program Manager has been associated appears in the Search Results Panel. To display the Organization’s details in the Details, Contents, Address, and Positions Tabs below the Organization Maintenance Panel click on the checkmark to the right of the record.
To clear the search and the Search Results Panel, click on the **Clear All** link. To clear the search only, click on the **Clear** icon.

**SEARCH HINTS:**

Searches do not have to be exact. For example, typing "program" in the search text box returns all Position Types containing the word "program" (Program Coordinators, Program Managers, Program Development Engineers, etc.). Typing a "p" in the search text box returns all Position Types containing a "p" in any part of the name.

Contact IDs are equivalent to PeopleSoft IDs for internal personnel. A Contact ID that begins with a "2" indicates an external contact.

**Working with Organizations**

The Organization Panel that displays when an Organization is selected or located in a search contains Details, Contents, Address, and Positions tabs.

From these tabs, organizations, addresses, and positions may be maintained. Child Organizations may also be displayed in the Contents tab, providing further information about the organization and an easy way to see all associated organizations.
Adding a Child Organization

To add a Child Organization, click on the Add New icon to the right of the Details Tab title bar.

In the ADD Organization Screen Mode, enter the Organization Name and select the Organization Type from the dropdown list and enter any optional information as needed. The Organization Number is assigned by SPMS.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.

Click the Save button to save the new record and return to the Details tab or click on the Cancel button to exit without saving. If saving, click on the OK button at the confirmation message.
SPMS will not save the record or leave the **ADD Screen Mode** if a required field is left empty. Instead, a red asterisk (*) will appear to the right of the field and the cursor will blink inside the field.

Once saved, the new **Child Organization** should be visible in the **Contents** tab. If not, click on a column heading to re-sort and refresh the List or use the **Filter** feature to locate the new record.

**Editing an Organization**

To edit an Organization, click on the **Edit** icon to the right of the **Details Tab** title bar. The **Edit** icon is only visible on Active (not Historical) organizations.

In the **EDIT Screen Mode**, update fields as needed.

Field values that are grayed out are auto-populated, and therefore **NON-EDITABLE**. Fields with a peach background are **REQUIRED**. Fields with no background color are **OPTIONAL**.
Click the Save button to save the record and return to the Details tab or click on the Cancel button to exit without saving.

SPMS will not save the record or leave the EDIT Screen Mode if a required field is left empty. Instead, a red asterisk (*) will appear to the right of the field and the cursor will blink inside the field.

Once saved, the updated Organization should be visible in the Contents tab. If not, click on a column heading to re-sort and refresh the List or use the Filter feature to locate the new record.

**Making an Organization Historical**

The Status of an Organization is either Active or Historical (Inactive).

To make an Organization historical, click on the Make Historical icon to the right of the Details Tab title bar.

A confirmation message displays. Click on the OK button to confirm the change or click on the Cancel button to exit without saving any changes.
The Organization’s Status changes to Historical and the Make Active icon replaces the Make Historical icon.

Making an Organization Active

To make the Organization Active again, click on the Make Active icon to the right of the Details Tab title bar.

A confirmation message displays. Click on the OK button to confirm the change or click on the Cancel button to exit without saving any changes.

The Organization’s Status changes back to Active and the Make Historical icon replaces the Make Active icon.

Viewing Contents

The Contents tab in the Organization Panel displays information about the organization’s child organizations.
Adding Addresses

To add Addresses, click on the Add New icon to the right of the Email column heading on the Address tab.

In the ADD Organization Address Screen Mode, select the Address Type from the dropdown list and enter the address information as needed.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.
Click the **Save** button to save the new record and return to the **Address** tab or click on the **Cancel** button to exit without saving. If saving, click on the **OK** button at the confirmation message.

**Message**

*Address added successfully.*

SPMS will not save the record or leave the **ADD Screen Mode** if a required field is left empty. Instead, a red **asterisk** (*) will appear to the right of the field and the cursor will blink inside the field.

Duplicate Address Types are acceptable. An Organization may have more than one mailing address, for example.

Once saved, the new **Address** should be visible in the **Address** tab. If not, click on a column heading to re-sort and refresh the List or use the **Filter** feature to locate the new record.

**Editing Addresses**

To edit an Address, click on the **Edit** icon to the right of the **Details Tab** title bar.

In the **EDIT Screen Mode**, update fields as needed. The **Address Type** may not be edited. If the type of address has changed, for historical purposes a new address should be added and the incorrect address should be made historical.
Click the **Save** button to save the record and return to the **Address** tab or click on the **Cancel** button to exit without saving. If saving, click on the **OK** button at the confirmation message.

**Copying Addresses**

To copy an Address, click on the **Copy Address** icon to the right of the **Details Tab** title bar.
In the **COPY Screen Mode**, select the **Address Type** to copy the address to.

In the **COPY Screen Mode**, select the **Address Type** to copy the address to.

<table>
<thead>
<tr>
<th>Address Type</th>
<th>Shipping Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address</td>
<td>P.O. Box 468</td>
</tr>
<tr>
<td>City</td>
<td>Farmersburg</td>
</tr>
<tr>
<td>State</td>
<td>In</td>
</tr>
<tr>
<td>Zip</td>
<td>47860</td>
</tr>
<tr>
<td>Phone</td>
<td>31344444444</td>
</tr>
<tr>
<td>Fax</td>
<td></td>
</tr>
<tr>
<td>Email</td>
<td></td>
</tr>
</tbody>
</table>

* This color background fields are mandatory

Click the **Save** button to save the record and return to the **Address** tab or click on the **Cancel** button to exit without saving. If saving, click on the **OK** button at the confirmation message.

Once saved, the new **Address** should be visible in the **Address** tab. If not, click on a column heading to re-sort and refresh the List or use the **Filter** feature to locate the new record.

### Making an Address Historical

The Status of an Organization’s Address is either Active or Historical (Inactive).

To make an Address historical, click on the **Make Historical** 🏛 icon to the right of the record.
A confirmation message displays. Click on the **OK** button to confirm the change or click on the **Cancel** button to exit without saving any changes.

![Message from webpage]

The Address’s **Status** changes to Historical and the **Make Active** icon replaces the **Make Historical** icon.

<table>
<thead>
<tr>
<th>Mailing Address</th>
<th>P.O. Box 456</th>
<th>Farmersburg</th>
<th>In</th>
<th>47850</th>
<th>3134444444</th>
<th>140</th>
<th>65</th>
</tr>
</thead>
</table>

**Making an Address Active**

To make the Address Active again, click on the **Make Active** icon to the right of record.

A confirmation message displays. Click on the **OK** button to confirm the change or click on the **Cancel** button to exit without saving any changes.

![Message from webpage]

The Address’s **Status** changes back to Active and the **Make Historical** icon replaces the **Make Active** icon.

**Adding Positions**

To add **Positions**, click on the **Add New** icon to the right of the **Status** column heading on the Positions tab.
A confirmation message displays. Click on the **OK** button to confirm the addition.

**Position added successfully.**

A “Not Assigned” row is added to the list of Positions with a **Position Sequence Number** assigned by SPMS and Active **Status**.

The Position may be maintained using the icons to the right of the record as explained in the following sections.

### Assigning Contacts

When a position is added to an organization, the position’s contact name is “Not assigned” and must be assigned to the position.
Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.

To assign a Contact to a position, click on the Assign Contact icon to the right of the position.

In the Assign Contact Screen Mode, two options are available.

1) A Contact may exist in the SPMS Contact List. If so, click in the Add Existing Contact radio button to select it. Type any part of the person’s name or ID in the empty text box and click on the Search icon to populate the dropdown list with the search results. The Clear icon may be used to clear the text box and/or dropdown list. Select the Contact ID/Name from the dropdown list and click on the Save button to return to the Positions tab. The Contact Name is added to the record. The Cancel button may be used to close the Assign Contact screen without saving.
SEARCH HINTS:

Searches do not have to be exact. For example, typing “397” in the search text box returns all Contact IDs containing the ’397’. Typing a “p” in the search text box returns all Contact Names containing a ”p” in any part of the name.

Contact IDs are equivalent to PeopleSoft IDs for internal personnel. A Contact ID that begins with a “2” indicates an external contact.

2) An external Contact may not exist in the SPMS Contact List. If not, click in the Add and Select New Contact radio button to select it. In the Assign Contact Screen Mode, enter the contact information as needed. The Contact Type defaults to “External” and the Contact ID is assigned by SPMS.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.
Click on the **Save** button to save the new record (this also adds the new Contact to the Contact List) and return to the **Positions** tab or click on the **Cancel** button to exit without saving.

SPMS will not save the record or leave the **ADD Screen Mode** if a required field is left empty. Instead, a red asterisk (*) will appear to the right of the field and the cursor will blink inside the field.

Once saved, the **Contact Name** should be visible in the record in the **Positions** tab. If not, click on a column heading to re-sort and refresh the List or use the **Filter** feature to locate the new record.

**Maintaining Position Types for a Position**

From the **Positions** tab, **Position Types** may be added or deleted. Click on the **Maintain Position Types** icon to the right of the record.

To add a Position Type, click on the **Add New** icon to the right of the **Position Type** column heading. Existing **Position Types** display in the **Maintain Position Type** Panel.
In the **ADD Screen Mode**, select the **Position Type** from the dropdown list.

Field values that are grayed out are auto-populated, and therefore **NON-EDITABLE**. Fields with a peach background are **REQUIRED**. Fields with no background color are **OPTIONAL**.

Dropdown fields have an auto-complete feature. For example, click on the Position Type dropdown arrow to the right of the field for a complete list of available Types. Typing a letter in the dropdown field navigates to the first value in the list that begins with that letter. For example, typing a “P” displays “Permit Engineer”.

Click the **Save** button to save the new record and return to the **Maintain Position Type Panel** or click on the **Cancel** button to exit without saving. Then, click on the **Close** button to return to the **Positions** tab.

SPMS does not allow a Position to have duplicate Position Types. If the record already exists in the database, a message displays in red directly below the Position Type field label.

Once saved, the new Position Type should be visible in the List. If not, click on any column heading twice to re-sort and refresh the List.

To delete a Position Type, click on the **Delete** icon next to the record to be removed.
A confirmation message displays. Click on the OK button to confirm the deletion or click on the Cancel button to exit without saving the deletion.

![Message from webpage]

The Position Type is removed from the list.

**Changing Position Organization**

From the **Positions** tab, the **Position Organization** may be changed. Click on the **Position Organization** icon to the right of the record.

![Change Organization]

In the **Change Position Organization Mode**, select the **New Organization** from the dropdown list.

Dropdown fields have an auto-complete feature. For example, click on the New Organization dropdown arrow to the right of the field for a complete list of available Types. Typing a letter in the dropdown field navigates to the first value in the list that begins with that letter. For example, typing a “D” displays “D.L. Savage Engineering”.
Click the **Save** button to save the record and return to the **Positions** tab or click on the **Cancel** button to exit without saving. If saving, click on the **OK** button at the confirmation message.

**Adding Position Addresses for a Position**

From the **Positions** tab, a Position's **Position Addresses** may be added, edited, or made historical or active. Click on the **Maintain Position Addresses** icon to the right of the record.
A Panel with two sections, **Position Address** and **Select Existing Organization Address**, displays. Each section is described below.

1) The **Position Address Section** allows for working with addresses specific to that Position. The example below reflects one Address (Mailing) assigned to the Position.

To add **Position Addresses** for a Position, click on the **Add New** icon to the right of the **Email** column heading on the **Position Address** tab.

In the **ADD Position Address Screen Mode**, select the **Address Type** from the dropdown list and enter the address information as needed.

Field values that are grayed out are auto-populated, and therefore **NON-EDITABLE**. Fields with a peach background are **REQUIRED**. Fields with no background color are **OPTIONAL**.
Click the **Save** button to save the new record and return to the **Position Address Panel** or click on the **Cancel** button to exit without saving.

SPMS will not save the record or leave the **ADD Screen Mode** if a required field is left empty. Instead, a red **asterisk** (*) will appear to the right of the field and the cursor will blink inside the field.

Once saved, the new **Position Address** should be visible in the **Position Address list**. If not, click on a column heading twice to re-sort and refresh the List. Then, click on the **Close** button to return to the **Positions** tab.

2) The **Select Existing Organization Address Section** displays all addresses associated with the Organization and may be assigned to the Position. Using this Panel is a convenient way to avoid retyping an address that may already exist for an organization. The example below reflects this Position’s Organization with two Addresses (Mailing and Shipping).
To use an existing organization address, click on the green checkmark ✓ to add it to the **Position Address List** for editing. It appears in the **Position Address Panel**. In the example below, the Shipping Address was selected and added to the addresses associated with the Position.

### Editing Position Addresses for a Position

To edit a **Position Address**, click on the **Edit ✏️** icon to the right of the record in the **Position Address Panel**.

In the **EDIT Screen Mode**, update fields as needed. The **Address Type** may not be edited. Field values that are grayed out are auto-populated, and therefore **NON-EDITABLE**. Fields with a peach background are **REQUIRED**. Fields with no background color are **OPTIONAL**.
Click the Save button to save the record and return to the Position Address Panel or click on the Cancel button to exit without saving.

SPMS will not save the record or leave the EDIT Screen Mode if a required field is left empty. Instead, a red asterisk (*) will appear to the right of the field and the cursor will blink inside the field.

Making a Position Address Historical

The Status of Position Address is either Active or Historical (Inactive).

To make a Position Address historical, click on the Make Historical icon to the right of the record.

A confirmation message displays. Click on the OK button to confirm the change or click on the Cancel button to exit without saving any changes.
The Position Address’s **Status** changes to Historical and the **Make Active** 🐠 icon replaces the **Make Historical** 🗨 icon.

### Making a Position Address Active

To make the Position Address Active again, click on the **Make Active** 🐠 icon to the right of the record.

A confirmation message displays. Click on the **OK** button to confirm the change or click on the **Cancel** button to exit without saving any changes.

The Position Address’s **Status** changes back to Active and the **Make Historical** 🗨 icon replaces the **Make Active** 🐠 icon.

### Viewing Position Histories

Click on the **View Position History** 🗳 icon to the right of the record.

A Panel displays a list of all changes made to that Position, as shown below.
Making a Position Historical

The Status of a Position is either Active or Historical (Inactive).

To make a Position historical, click on the Make Historical 🗺 icon to the right of the record.

A confirmation message displays. Click on the OK button to confirm the change or click on the Cancel button to exit without saving any changes.

The Position’s Status changes to Historical and the Make Active 🚶 icon replaces the Make Historical 🗺 icon.

Making a Position Active

To make the Position Active again, click on the Make Active 🚶 icon to the right of record.

A confirmation message displays. Click on the OK button to confirm the change or click on the Cancel button to exit without saving any changes.
The Position’s **Status** changes back to Active and the **Make Historical**  

![](image) icon replaces the **Make Active**  

![](image) icon.

### User List

The **User List** contains authorized SPMS Users and the security tokens and roles assigned to them. Users can be assigned any combination of roles and tokens and are refused access to features without the proper security.

To maintain the list of Users, select **User List** from the **System Maintenance** menu.

From the **User List Panel**, Users may be edited, or made historical or active. Tokens and Roles may also be assigned to Users.
Access to menu selections, icons and features is dependent on a User’s role and security level. For details, refer to Understanding the Screen in the Getting Started section.

There are six functions on the User List Panel to select for maintaining. View Details, Edit, Make Historical, Make Active, Assign Tokens, Assign Roles to Users.

Assigning a Token to a User

To assign a Token to a User, click on the Assign Tokens icon next to the User to be updated. By default, Tokens already assigned to that User appear at the top of the User Tokens List with a checkmark in the Assign column.
Navigate to the Token to be assigned or apply a Filter to see only the Token ID or Description of the Token to be assigned.

Instructions for common functions such as Viewing Details, Applying Filters, Sorting, Showing More Items per Page, and Exporting to Microsoft Excel may be found in the Getting Started section.

Click in the Assign checkbox to place a checkmark next to the Token ID(s) to be assigned. Click the Save button to accept the new assignment or click on the Close button to exit without saving. Then, click on the Close button to return to the User List Panel.

Assigning a Role to a User

To assign a Role to a User, click on the Assign Roles icon next to the User to be updated. By default, Roles already assigned to that User appear at the top of the User Roles List with a checkmark in the Assign column.
Navigate to the Role to be assigned or apply a Filter to see only the Role ID or Name of the Role to be assigned.

Instructions for common functions such as Viewing Details, Applying Filters, Sorting, Showing More Items per Page, and Exporting to Microsoft Excel may be found in the Getting Started section.

Click in the Assign checkbox to place a checkmark next to the Role(s) to be assigned. Click on the Save button to accept the new assignment or click on the Close button to exit without saving. Then, click on the Close button to return to the User List Panel.

Adding a User

Adding a User to SPMS is handled through the ITAP (INDOT Technical Application Pathway) system. A user wishing to use SPMS will request the application through ITAP. The appropriate approvals are obtained and the user will receive an email indicating they have been approved or denied access to SPMS. ITAP can be accessed at itap.indot.in.gov.

Edit User

To edit a User, click on the Edit icon next to the record to be updated.

In the EDIT Screen Mode, update fields as needed.
Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.

Click on the **Save** Button to save the record and return to the User List Panel; Click on the **Cancel** button to exit without saving.

SPMS will not save the record or leave the **EDIT Screen Mode** if a required field is left empty. Instead, a red asterisk (*) will appear to the right of the field and the cursor will blink inside the field.

The changes should be visible in the List. If not, click on the **Status Date** column heading to re-sort and refresh the List.

**Making a User Historical**

The Status of a User is either Active or Historical (Inactive). The List of Users may be sorted by Status to place all historical Users at the bottom of the list. Historical Users may be made Active again.

To make a User historical, click on the **Make Historical** icon next to the record to be made historical.

A confirmation message displays. Click on the **OK** button to confirm the change or click on the **Cancel** button to exit without saving any changes.
The User’s **Status** changes to Historical, the **Status Date** changes to the current date and the **Make Active** icon replaces the **Make Historical** icon. To sort the User List so all Historical Users are moved to the bottom of the list, click on the **Status** column heading to sort the column.

<table>
<thead>
<tr>
<th>ACIDUAL</th>
<th>Duvall, Sue</th>
<th>N</th>
<th>N</th>
<th>Historical</th>
<th>07/20/2011</th>
</tr>
</thead>
</table>

### Making a User Active

To make the User Active again, click on the **Make Active** icon next to the record to be made active.

A confirmation message displays. Click on the **OK** button to confirm the change or click on the **Cancel** button to exit without saving any changes.

The User’s **Status** changes back to Active, the **Status Date** changes to the current date and the **Make Historical** icon replaces the **Make Active** icon.

<table>
<thead>
<tr>
<th>ACIDUAL</th>
<th>Duvall, Sue</th>
<th>N</th>
<th>N</th>
<th>Active</th>
<th>07/20/2011</th>
</tr>
</thead>
</table>

### Role List
A Role is a collection of security tokens that can be assigned to a User or a Project. Users can be assigned any combination of roles and tokens and are refused access to features without the proper security.

To maintain the list of Roles, select Role List from the System Maintenance menu.

From the Role List Panel, Roles may be added, edited, or made historical or active. Tokens, Users and Projects may also be assigned to Roles.

Access to menu selections, icons and features is dependent on a User’s role and security level. For details, refer to Understanding the Screen in the Getting Started section.
Assigning a Token to a Role

To assign a Token to a Role, click on the **Assign Tokens** icon next to the Role to be updated. By default, Tokens already assigned to that Role appear at the top of the **Role Tokens List** with a checkmark in the Assign column.

Navigate to the Token to be assigned or apply a Filter to see only the Token ID or Description of the Token to be assigned.

Instructions for common functions such as **Viewing Details**, **Applying Filters**, **Sorting**, **Showing More Items per Page**, and **Exporting to Microsoft Excel** may be found in the Getting Started section.

Click in the **Assign** checkbox to place a checkmark next to the Token ID(s) to be assigned. Click the **Save** button to accept the new assignment or click on the **Close** button to exit without saving. Then, click on the **Close** button to return to the **Role List Panel**.

Assigning a User to a Role

To assign a User to a Role, click on the **Assign Users** icon next to the Role to be updated. By default, Users already assigned to that Role appear at the top of the **Role Users List** with a checkmark in the Assign column.
Navigate to the User to be assigned or apply a Filter to see only the User ID or Name of the User to be assigned.

Instructions for common functions such as Viewing Details, Applying Filters, Sorting, Showing More Items per Page, and Exporting to Microsoft Excel may be found in the Getting Started section.

Click in the Assign checkbox to place a checkmark next to the User ID(s) to be assigned. Click the Save button to accept the new assignment or click on the Close button to exit without saving. Then, click on the Close button to return to the Role List panel.

**Assigning a Project to a Role**

To assign a Project to a Role, click on the Assign Projects icon next to the Role to be updated. Projects already assigned to that Role appear in the Role - Project List.
Instructions for common functions such as Viewing Details, Applying Filters, Sorting, Showing More Items per Page, and Exporting to Microsoft Excel may be found in the Getting Started section.

Click on the Add New icon to the right of the Des Status column heading.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.

In the ADD Screen Mode, the Des # may be entered or selected from the Des Basket.

**Entering the Des #**

Enter the Des # of the Project to be assigned in the Des# field. Click the Cancel button to exit without saving or click on the Save button to save the new record. A message displays to confirm the successful addition of the record to the List. Click on the OK button to return to the Role – Project panel.
Selecting the Des # from the Des Basket
To select from the Des Basket, place a checkmark next to the Des #(#s) to be assigned. Place a checkmark in the Readonly checkbox to give the User read-only access (the User can see the Project but cannot make changes) to a Project. If all Des #s in the Des Basket should be assigned, place a checkmark in the Check All checkbox. Click on the Add button to save the new record(s).

SPMS will not save the record or leave the ADD Screen Mode if a required field is left empty. Instead, a red asterisk (*) will appear to the right of the field and the cursor will blink inside the field.

Once saved, the new Role should be visible in the Role – Project List. If not, click on any column heading twice to re-sort and refresh the List.

Projects may be unassigned by clicking on the Delete icon to the right of the record to be removed.

A confirmation message displays. Click on the OK button to confirm the deletion or the Cancel button to exit without making any changes.

Adding a Role
To add a Role, click on the Add New icon to the right of the Status Date column heading.

In the ADD Screen Mode, enter information as needed.
Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.

Click the **Save** button to save the new record and return to the **Role List Panel** or click on the **Cancel** button to exit without saving. If saving, click on the **OK** button at the confirmation message.

**New item has been added successfully.**
SPMS will not save the record or leave the ADD Screen Mode if a required field is left empty. Instead, a red asterisk (*) will appear to the right of the field and the cursor will blink inside the field.

SPMS does not allow duplicates. If the record already exists in the database, a message displays.

Once saved, the new Role should be visible in the List. If not, click on the Status Date column heading twice to re-sort and refresh the List.

**Editing a Role**

To edit a Role, click on the Edit icon next to the record to be updated.

In the EDIT Screen Mode, update fields as needed.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.

Click the Save button to save the record and return to the Role List Panel or click on the Cancel button to exit without saving.
SPMS will not save the record or leave the **EDIT Screen Mode** if a required field is left empty. Instead, a red **asterisk (**) will appear to the right of the field and the cursor will blink inside the field.

```
<table>
<thead>
<tr>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>*</td>
</tr>
</tbody>
</table>
```

SPMS does not allow duplicates. If the record already exists in the database, a message displays.

```
Message

![Record already exists]

OK
```

The changes should be visible in the List. If not, click on the **Status Date** column heading to re-sort and refresh the List.

**Making a Role Historical**

The Status of a Role is either Active or Historical (Inactive). The List of Roles may be sorted by Status to place all historical Roles at the bottom of the list. Historical Roles may be made Active again.

To make a Role historical, click on the **Make Historical** 🏛 icon next to the record to be made historical.

```
<table>
<thead>
<tr>
<th>AUthorizeState2</th>
<th>Authorize District State Design Project Role</th>
<th>Active</th>
<th>07/20/2010</th>
</tr>
</thead>
</table>
```

A confirmation message displays. Click on the **OK** button to confirm the change or click on the **Cancel** button to exit without saving any changes.

```
Message from webpage

![Are you sure you want to mark this record as historical?]

OK   Cancel
```

The Role’s **Status** changes to Historical, the **Status Date** changes to the current date and the **Make Active 🕒** icon replaces the **Make Historical 🏛** icon. To sort the Role List so all Historical Roles are moved to the bottom of the list, click on the **Status** column heading to sort the column.
Making a Role Active

To make the Role Active again, click on the Make Active icon next to the record to be made active.

A confirmation message displays. Click on the OK button to confirm the change or click on the Cancel button to exit without saving any changes.

The Role’s Status changes back to Active, the Status Date changes to the current date and the Make Historical icon replaces the Make Active icon.

Assign Project Roles

SPMS can automate the process by which security roles are assigned to a new Project based on the Organization, Designed By and Work Category information for the project. For this to occur, a Project Role Assignment is created in SPMS. Each Project Role Assignment associates one or more Project Role(s) and one or more Work Category to a specific Organization and Designed By value. When a proposed Project matches the Organization and Designed By information of an existing Project Role Assignment, the security roles included in that Assignment are automatically transferred to the new Project.
To maintain Project Role Assignments, select Assign Project Roles from the System Maintenance menu.

From the Assign Project Role Panel, Role Assignments may be added or deleted and existing Roles assigned to the Project Role may be viewed, added, edited or deleted.

Access to menu selections, icons and features is dependent on a User’s role and security level. For details, refer to Understanding the Screen in the Getting Started section.
Instructions for common functions such as Viewing Details, Applying Filters, Sorting, Showing More Items per Page, and Exporting to Microsoft Excel may be found in the Getting Started section.

Adding a Project Role Assignment

To add a Project Role Assignment, click on the Add New icon to the right of the Work Category column heading.

In the ADD Screen Mode, enter information as needed.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.

Dropdown fields have an auto-complete feature. For example, click on the Organization dropdown arrow to the right of the field for a complete list of available Organizations. Typing a letter in the dropdown field navigates to the first value in the list that begins with that letter. For example, typing an “S” displays “Seymour - Construction”.

![Screen Mode: ADD](image)

Organization

Designed By

Work Category

Role

Read Only

Save Cancel

* This color background fields are mandatory
Click the **Save** button to save the new record and return to the **Assign Project Role Panel** or click on the **Cancel** button to exit without saving. If saving, click on the **OK** button at the confirmation message.

**New item has been added successfully.**
SPMS will not save the record or leave the **ADD Screen Mode** if a required field is left empty. Instead, a red **asterisk** (*) will appear to the right of the field and the cursor will blink inside the field.

SPMS does not allow duplicates. If the record already exists in the database, a message displays.

The new **Project Role Assignment** is added to the list. To see the new **Project Role Assignment**, filter the list to display only the **Role Assignment** just added. Instructions for Applying Filters may be found in the Getting Started section.

**Deleting a Project Role Assignment**

To delete a **Project Role Assignment**, click on the **Delete** 🗑️ icon next to the record to be removed.

A confirmation message displays. Click on the **OK** button to confirm the change or click on the **Cancel** button to exit without saving any changes.

The Project Role Assignment is removed from the list.

**Adding Role Information to a Project Role Assignment**

To view a list of Role Information for a **Project Role Assignment**, click on the **Items** 📜 icon next to that record in the **Assign Project Role Panel**.

Roles may be added, edited, or deleted from the **Project Assign Role Detail Panel**.
To add a Role, click on the Add New icon to the right of the Read only column heading.

In the ADD Screen Mode, select the Role’s Description from the dropdown list. Read-Only means User has only read permission.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.

Dropdown fields have an auto-complete feature. For example, click on the Role dropdown arrow to the right of the field for a complete list of available Role Descriptions. Typing a letter in the dropdown field navigates to the first value in the list that begins with that letter. For example, typing a "P" displays “PAVEMENT DESIGN ACTIVITY ROLE”.

Organization: Aerial Engineering
Designed By: State
Work Category: Access Control Project (Right-of-Way)
Click the **Save** button to save the new record and return to the **Project Assign Role Detail Panel** or click on the **Cancel** button to exit without saving. If saving, click on the **OK** button at the confirmation message.

**Message**

*New item has been added successfully.*

---

**Maintain Crawfordsville District Project Role**
**Maintain Crawfordsville District State Design Project Role**
**Maintain D1-D6 District Project Role**
**Maintain District State Design Project Role**
**Maintain Ft Wayne District Project Role**
**Maintain Ft Wayne District State Design Project Role**
**Maintain Greenfield District Project Role**
**Maintain Greenfield District State Design Project Role**
**Maintain Laporte District Project Role**
**Maintain Laporte District State Design Project Role**
**Maintain Local Project Role**
**Maintain Multi-Modal Project Role**
**Maintain Project Data - Generic**
**Maintain Project Data Role**
**Maintain Seymour District Project Role**
**Maintain Seymour District State Design Project Role**
**Maintain State1 Design Project Role**
**Maintain State3 Design Project Role**
**Maintain Toll Road District Project Role**
**Maintain Vincennes District Project Role**
**Maintain Vincennes District State Project Role**
**MPO General Project Browse Role**
**Multi-Modal Coordinator Add Role**
**Multi-Modal Coordinator Browse Role**
**Multi-Modal Coordinator Change Role**
**Multi-Modal Coordinator Delete Role**
**Multi-Modal Coordinator Menu Role**
**Notice to Proceed Activity Role**
**Open to Traffic Activity Role**
**Pavement Design Activity Role**
**Pavement Design Activity Role**

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**SPMS_User_Guide**

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**Last Save Date:** 12/20/2011

**Author:** April Schwering

**Version:** 4.1
SPMS will not save the record or leave the **ADD Screen Mode** if a required field is left empty. Instead, a red **asterisk (\*)** will appear to the right of the field and the cursor will blink inside the field.

SPMS does not allow duplicates. If the record already exists in the database, a message displays.

To see the new Role in the list, click on the Role Description column heading to sort the list by Role Description.

**Editing Role Information associated with a Project Role**

To view a Role’s Information, click on the **Items** icon next to that record in the **Assign Project Role Panel**.

Roles may be added, edited, or deleted from the **Project Assign Role Detail Panel**.

To edit a Role, click on the **Edit** icon next to the record to be updated.
In the **EDIT Screen Mode**, update the **Read Only** field as needed.

Field values that are grayed out are auto-populated, and therefore **NON-EDITABLE**. Fields with a peach background are **REQUIRED**. Fields with no background color are **OPTIONAL**.

![Image](image1.png)

Click the **Save** button to save the record and return to the **Project Assign Role Detail Panel** or click on the **Cancel** button to exit without saving.

To see the changes made to the Role, click on the Role Description column heading to sort the list by Role Description.

**Deleting Role Information associated with a Project Role**

To delete Role Information, click on the **Delete** icon next to the record to be removed.

A confirmation message displays. Click on the **OK** button to confirm the deletion or click on the **Cancel** button to exit without saving any changes.

![Image](image2.png)

The Role is removed from the list.

**Phase List**

The **Phase List** contains the valid steps involved in the Stages of Project development.

To maintain the list of Phases, select **Phase List** from the **System Maintenance** menu.
From the **Phase List Panel**, Phases may be added, edited, or made historical or active.

Access to menu selections, icons and features is dependent on a User’s role and security level. For details, refer to **Understanding the Screen** in the Getting Started section.

Instructions for common functions such as Viewing Details, Applying Filters, Sorting, Showing More Items per Page, and Exporting to Microsoft Excel may be found in the Getting Started section.
Adding a Phase

To add a Phase, click on the Add New icon to the right of the Status Date column heading.

In the ADD Screen Mode, enter information as needed.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.

Click the Save button to save the new record and return to the Phase List Panel or click on the Cancel button to exit without saving. If saving, click on the OK button at the confirmation message.
SPMS will not save the record or leave the ADD Screen Mode if a required field is left empty. Instead, a red asterisk (*) will appear to the right of the field and the cursor will blink inside the field.

SPMS does not allow duplicates. If the record already exists in the database, a message displays.

Once saved, the new Phase should be visible in the List. If not, click on the Status Date column heading twice to re-sort and refresh the List.

**Editing a Phase**

To edit a Phase, click on the Edit icon next to the record to be updated.

In the EDIT Screen Mode, update fields as needed.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.

Click the Save button to save the record and return to the Phase List Panel or click on the Cancel button to exit without saving.
SPMS will not save the record or leave the **EDIT Screen Mode** if a required field is left empty. Instead, a red asterisk (*) will appear to the right of the field and the cursor will blink inside the field.

The changes should be visible in the List. If not, click on the **Status Date** column heading to re-sort and refresh the List.

### Making a Phase Historical

The Status of a Phase is either Active or Historical (Inactive). The List of Phases may be sorted by Status to place all historical Phases at the bottom of the list. Historical Phases may be made Active again.

To make a Phase historical, click on the **Make Historical** icon next to the record to be made historical.

A confirmation message displays. Click on the **OK** button to confirm the change or click on the **Cancel** button to exit without saving any changes.

The Phase’s **Status** changes to Historical, the **Status Date** changes to the current date and the **Make Active** icon replaces the **Make Historical** icon. To sort the Phase List so all Historical Phases are moved to the bottom of the list, click on the **Status** column heading to sort the column.

### Making a Phase Active

To make the Phase Active again, click on the **Make Active** icon next to the record to be made active.

A confirmation message displays. Click on the **OK** button to confirm the change or click on the **Cancel** button to exit without saving any changes.
The Phase’s **Status** changes back to Active, the **Status Date** changes to the current date and the **Make Historical** icon replaces the **Make Active** icon.

### Stage List

The **Stage List** contains the valid steps involved in Project development.

To maintain the list of Stages, select **Stage List** from the **System Maintenance** menu.

From the **Stage List Panel**, Stages may be added, edited, or made historical or active.

Access to menu selections, icons and features is dependent on a User’s role and security level. For details, refer to **Understanding the Screen** in the Getting Started section.
Instructions for common functions such as Viewing Details, Applying Filters, Sorting, Showing More Items per Page, and Exporting to Microsoft Excel may be found in the Getting Started section.

**Adding a Stage**

To add a Stage, click on the Add New icon to the right of the Status Date column heading.

In the **ADD Screen Mode**, enter information as needed.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are **REQUIRED**. Fields with no background color are **OPTIONAL**.

Click the **Save** button to save the new record and return to the **Stage List Panel** or click on the **Cancel** button to exit without saving. If saving, click on the **OK** button at the confirmation message.
SPMS will not save the record or leave the **ADD Screen Mode** if a required field is left empty. Instead, a red *asterisk* (*) will appear to the right of the field and the cursor will blink inside the field.

![Stage Code](image)

SPMS does not allow duplicates. If the record already exists in the database, a message displays.

![Message](image)

Once saved, the new Stage should be visible in the List. If not, click on the **Status Date** column heading twice to re-sort and refresh the List.

**Editing a Stage**

To edit a Stage, click on the **Edit** icon next to the record to be updated.

In the **EDIT Screen Mode**, update fields as needed.

![N](image)

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.
Click the **Save** button to save the record and return to the **Stage List Panel** or click on the **Cancel** button to exit without saving.

SPMS will not save the record or leave the **EDIT Screen Mode** if a required field is left empty. Instead, a red asterisk (*) will appear to the right of the field and the cursor will blink inside the field.

The changes should be visible in the List. If not, click on the **Status Date** column heading to re-sort and refresh the List.

### Making a Stage Historical

The Status of a Stage is either Active or Historical (Inactive). The List of Stages may be sorted by Status to place all historical Stages at the bottom of the list. Historical Stages may be made Active again.

To make a Stage historical, click on the **Make Historical** icon next to the record to be made historical.

A confirmation message displays. Click on the **OK** button to confirm the change or click on the **Cancel** button to exit without saving any changes.

The Stage’s **Status** changes to Historical, the **Status Date** changes to the current date and the **Make Active** icon replaces the **Make Historical** icon. To sort the Stage List so all Historical Stages are moved to the bottom of the list, click on the **Status** column heading to sort the column.
Making a Stage Active

To make the Stage Active again, click on the Make Active icon next to the record to be made active.

A confirmation message displays. Click on the OK button to confirm the change or click on the Cancel button to exit without saving any changes.

The Stage's Status changes back to Active, the Status Date changes to the current date and the Make Historical icon replaces the Make Active icon.

Valid Phase/Stage List

Projects are organized into Phases, which are further classified by Stages. System Administrators maintain the Phase List and Stage List, under the System Maintenance menu. The Valid Phase/Stage List allows System Administrators to specify the valid combinations between the phase list and the stage list. The column labels and number of columns are dependent upon the stage reference table. The row labels and number of rows are dependent upon the phase reference table. Each combination specified as valid allows users to enter project costs on the ESTIMATE panel of the DES Maintenance screen.

WARNING: Changes to the Phase, Stage, and Valid Phase/Stage List should be handled carefully because Project costs that have been entered in the Estimate Panel are affected. Therefore, it is recommended that the System Administrator contact MIS for assistance when changes to these lists are needed.

To maintain the list of valid Phases and Stages, select Valid Phase/Stage List from the System Maintenance menu.
To add a Stage to a Project Phase, place a checkmark \( \checkmark \) in that field. To remove a Stage, click to remove the checkmark \( \square \) from the checkbox in that field.

Access to menu selections, icons and features is dependent on a User's role and security level. For details, refer to Understanding the Screen in the Getting Started section.

<table>
<thead>
<tr>
<th>Sequence</th>
<th>Phase Code</th>
<th>Phase</th>
<th>Appt Prior.</th>
<th>Propose</th>
<th>Initial</th>
<th>Eng Assessment</th>
<th>Design</th>
<th>Letting</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>PE1</td>
<td>Preliminary Engineering 1</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>PE2</td>
<td>Preliminary Engineering 2</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>RW1</td>
<td>Right of Way Purchase</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>RW2</td>
<td>Right of Way Services</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>UT1</td>
<td>Utilities PE</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>UT2</td>
<td>Utilities CN</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>RR1</td>
<td>Railroad PE</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>RR2</td>
<td>Railroad CN</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>CN</td>
<td>Construction</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>CE</td>
<td>Construction Engineering</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>RG1</td>
<td>Relinquishment Payment</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>ZEP</td>
<td>WhZone Patrol &amp; Enforcement</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
</tbody>
</table>

Click on the **Save** button when finished.
Control Records

The **Control Records List** contains preset numerical values assigned to various functions in SPMS. As functions are performed, values in the **Control Records List** are automatically incremented according to business rules. System Administrators may need to add new or maintain existing **Control Records** to reinitialize counters in certain situations.

Select **Control Records** from the **System Maintenance** menu.

From the **Control Record List Panel**, Control Records may be added or edited.

Access to menu selections, icons and features is dependent on a User’s role and security level. For details, refer to **Understanding the Screen** in the Getting Started section.
Instructions for common functions such as Viewing Details, Applying Filters, Sorting, Showing More Items per Page, and Exporting to Microsoft Excel may be found in the Getting Started section.

**Adding a Control Record**

To add a Control Record, click on the **Add New** icon to the right of the **Data** column heading.

In the **ADD Screen Mode**, enter information as needed.

Field values that are grayed out are auto-populated, and therefore **NON-EDITABLE**. Fields with a peach background are **REQUIRED**. Fields with no background color are **OPTIONAL**.

Click the **Save** button to save the new record and return to the **Control Record List Panel** or click on the **Cancel** button to exit without saving. If saving, click on the **OK** button at the confirmation message.
SPMS will not save the record or leave the ADD Screen Mode if a required field is left empty. Instead, a red asterisk (*) will appear to the right of the field and the cursor will blink inside the field.

SPMS does not allow duplicates. If the record already exists in the database, a message displays.

Once saved, the new Control Record should be visible in the List. If not, click on the Control Code or Data column heading twice to re-sort and refresh the List.

Editing a Control Record

To edit a Control Record, click on the Edit icon next to the record to be updated.

In the EDIT Screen Mode, update fields as needed.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.
Click the Save button to save the record and return to the Control Record List Panel or click on the Cancel button to exit without saving.

SPMS will not save the record or leave the EDIT Screen Mode if a required field is left empty. Instead, a red asterisk (*) will appear to the right of the field and the cursor will blink inside the field.

The changes should be visible in the List. If not, click on the Control Code or Data column heading to re-sort and refresh the List.

Reports

Selecting and Running a Report

To run and view Reports, select Reports from the menu.

Access to menu selections, icons and features is dependent on a User’s role and security level. For details, refer to Understanding the Screen in the Getting Started section.
Click on the **Select Report** dropdown list to choose the Report to submit. Descriptions, parameters, and instructions for each Report are in the next section below.

When a Report is submitted, it is added to the Report Queue with a Queued status and date and time. Click on the **Refresh** icon periodically to update the Queue. While the Report runs, its status changes to **Processing**. When the Report is finished running, the date and time appear in the **Completed** column and a **PDF** icon becomes available to view the Report.

**While running:**

<table>
<thead>
<tr>
<th>Sequence</th>
<th>Report</th>
<th>Status</th>
<th>Queued</th>
<th>Completed</th>
</tr>
</thead>
<tbody>
<tr>
<td>2235</td>
<td>Full Project Listing</td>
<td>Queued</td>
<td>7/14/2011 15:01 PM</td>
<td></td>
</tr>
</tbody>
</table>

**When completed:**

<table>
<thead>
<tr>
<th>Sequence</th>
<th>Report</th>
<th>Status</th>
<th>Queued</th>
<th>Completed</th>
</tr>
</thead>
<tbody>
<tr>
<td>2237</td>
<td>Full Project Listing</td>
<td>Complete</td>
<td>7/14/2011 15:54 PM</td>
<td>7/14/2011 15:55 PM</td>
</tr>
</tbody>
</table>

Instructions for common functions such as **Viewing Details**, **Applying Filters**, **Sorting**, **Showing More Items per Page**, and **Exporting to Microsoft Excel** may be found in the Getting Started section.
The Report Queue displays information about the User's submitted Reports, including the Report's name, its status, and the time it was queued (submitted) and completed. Reports are executed in 5-minute intervals (for example, 5:00, 5:05, 5:10). If a Report is queued at 5:01, it will not begin processing until 5:05. A report's Sequence Number is system-generated and reused when the report is deleted from the Queue.

From the Report Queue, submitted Reports may be viewed, saved, printed, and removed from the list when no longer needed.

If a Report finds no data, the Report will complete and contain the message “No data found for this Report” below the Report’s title.

If a Report does not complete within a reasonable amount of time, click on the SPMS Support email icon for assistance.

Report Descriptions and Instructions

When a Report is selected from the dropdown list, a Report Parameters Panel appears requiring information on what data should be included in the Report.

Field values that are grayed out are auto-populated, and therefore NON-EDITABLE. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.

The Full Project Listing, the Project Log, the Project Activity Log and the Project Cost Estimate Log may also be accessed from the icon bar, located on all Project Maintenance pages and Reports and Cost Maintenance sections of the Project Maintenance Main Page.

Full Project Listing

Description: This report includes Project description, funding, activities and scheduling information for the selected Project(s).
The Project must be placed on INDOT’s official Letting List for the **Letting Date** to appear in the Full Project Listing.

Parameters: Projects from the **Des Basket** or **Search Results Panel** (values are populated from the most recent **Project Search**) may be selected from the Parameters Panel. Click in the radio button to select **Use Des Basket** or **Use Search Values** and then use CTRL-click or SHIFT-click to select multiple records. A User may select up to 200 Des #s. A message displays when the maximum has been reached, as shown below.

Use the **Select All** link at the top of the Panel to select all records in the list. The **Clear All** link at the top of the Panel deselects all selected records in the list. A confirmation message displays making sure the selections should be cleared.
The Full Project Listing icon in the Project Search - Search Results Panel, Project Maintenance Panels or Des Basket should be used to view or print one or a small number of Projects immediately. These methods do not involve the Report Queue.

Click on the Submit Report button to add the report to the Report Queue.

**Project Activity Log**

**Description:** This report lists Activity Log entries for the selected Project(s).
Parameters: Projects from the Des Basket or Search Results Panel (values are populated from the most recent Project Search) may be selected from the Parameters Panel. Click in the radio button to select Use Des Basket or Use Search Values and then use CTRL-click or SHIFT-click to select multiple records. A User may select up to 200 Des #s. A message displays when the maximum has been reached, as shown below.

Use the Select All link at the top of the Panel to select all records in the list. The Clear All link at the top of the Panel deselects all selected records in the list. A confirmation message displays making sure the selections should be cleared.

The Project Activity Log icon on the Project Maintenance Panels should be used to view or print one or a small number of Projects immediately. These methods do not involve the Report Queue.
Enter any other optional information as needed (for example, select the **Requester**’s name from the dropdown list to limit the report to that person’s activity).

Dropdown fields have an auto-complete feature. For example, click on the **Requester** dropdown arrow to the right of the field for a complete list of available names. Typing any letter in a dropdown field navigates to the first value in the list that begins with that letter. For example, typing a “D” displays “Dagwell, Jason”.

* This color background fields are mandatory.
Date fields have two options. A date (mm/dd/yyyy) may be entered directly in the field or the Calendar icon may be used to find a date. Click on the Calendar icon to display the Calendar window.

Then, click on the desired date to populate the field.

Click on the Submit Report button to add the report to the Report Queue.
**Description:** This report lists Project Log entries for the selected Project(s).

**Parameters:** Projects from the Des Basket or Search Results Panel (values are populated from the most recent Project Search) may be selected from the Parameters Panel. Click in the radio button to select Use Des Basket or Use Search Values and then use CTRL-click or SHIFT-click to select multiple records. A User may select up to 200 Des #s. A message displays when the maximum has been reached, as shown below.

Use the Select All link at the top of the Panel to select all records in the list. The Clear All link at the top of the Panel deselects all selected records in the list. A confirmation message displays making sure the selections should be cleared.

![Select All and Clear All options](image)
Enter any other optional information as needed (for example, select the Requester’s name from the dropdown list to limit the report to that person’s activity).

Dropdown fields have an auto-complete feature. For example, click on the Requester dropdown arrow to the right of the field for a complete list of available names. Typing any letter in a dropdown field navigates to the first value in the list that begins with that letter. For example, typing a “D” displays “Dagwell, Jason”.

```
Log Begin Date
Log End Date
Subject
Requester
UserID

Use Des Basket Use Search Values

0 of 2 Clear All Select All

0000720 - 56th St at Moeller Rd
0000760 - Bridge over Opossum Run

Submit Report

* This color background fields are mandatory
```
Date fields have two options. A date (mm/dd/yyyy) may be entered directly in the field or the Calendar icon may be used to find a date. Click on the Calendar icon to display the Calendar window.

Then, click on the desired date to populate the field.

Click on the Submit Report button to add the report to the Report Queue.

### Letting List Report – By Date Range
Description: This report is a listing of Projects advertised for bid within a specific time frame. Projects are frequently added to or removed from this list as business decisions are made.

Parameters: Enter or select the Letting Begin Date and Letting End Date and click on the Submit Report button. The report may include more than one month. For example, enter a date range of 1/1/2010 to 1/31/2010 for a list of Projects advertised for bid during the month of January or enter a date range of 7/1/2008 to 12/31/2009 for a list of Projects advertised for bid during those months.
Date fields have two options. A date (mm/dd/yyyy) may be entered directly in the field or the Calendar icon may be used to find a date. Click on the Calendar icon to display the Calendar window.

Then, click on the desired date to populate the field.

Click on the Submit Report button to add the report to the Report Queue.

**Letting List Report – By District**

**Description:** This report is a listing of Projects advertised for bid within a specific time frame and District. Projects are frequently added to or removed from this list as business decisions are made.
**Parameters:** Enter or select the **Letting Begin Date** and **Letting End Date**, select the **District ID** from the dropdown list and click on the **Submit Report** button. The report may include more than one month. For example, enter a date range of 1/1/2010 to 1/31/2010 for a list of Projects advertised for bid during the month of January or enter a date range of 7/1/2008 to 12/31/2009 for a list of Projects advertised for bid during those months.

<table>
<thead>
<tr>
<th>Letting Begin Date</th>
<th>MM/DD/YYYY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Letting End Date</td>
<td>MM/DD/YYYY</td>
</tr>
<tr>
<td>District ID</td>
<td></td>
</tr>
</tbody>
</table>

* This color background fields are mandatory

Date fields have two options. A date (mm/dd/yyyy) may be entered directly in the field or the Calendar icon may be used to find a date. Click on the Calendar icon to display the Calendar window.

![Calendar](image)

Then, click on the desired date to populate the field.

Click on the **Submit Report** button to add the report to the **Report Queue**.

**Letting List Report – By Single Date**

**Description:** This report is a listing of Projects advertised for bid on a specific date. Projects are frequently added to or removed from this list as business decisions are made.
Parameters: Enter or select the Letting End Date and click on the Submit Report button.

<table>
<thead>
<tr>
<th>Letting List Report - By Single Date Report Parameters</th>
</tr>
</thead>
<tbody>
<tr>
<td>Letting End Date</td>
</tr>
<tr>
<td>MM/DD/YYYY</td>
</tr>
<tr>
<td>Submit Report</td>
</tr>
</tbody>
</table>

* This color background fields are mandatory
Date fields have two options. A date (mm/dd/yyyy) may be entered directly in the field or the Calendar icon may be used to find a date. Click on the Calendar icon to display the Calendar window.

Then, click on the desired date to populate the field.

Click on the Submit Report button to add the report to the Report Queue.

**Project Cost Estimate Log**

**Description:** This report lists Project Cost Estimate Log entries for the selected Project(s).
Parameters: Projects from the Des Basket or Search Results Panel (values are populated from the most recent Project Search) may be selected from the Parameters Panel. Click in the radio button to select Use Des Basket or Use Search Values and then use CTRL-click or SHIFT-click to select multiple records. A User may select up to 200 Des #s. A message displays when the maximum has been reached, as shown below.

Use the Select All link at the top of the Panel to select all records in the list. The Clear All link at the top of the Panel deselects all selected records in the list. A confirmation message displays making sure the selections should be cleared.

Enter any other optional information as needed (for example, select the Requester’s name from the dropdown list to limit the report to that person’s activity).
Dropdown fields have an auto-complete feature. For example, click on the Requester dropdown arrow to the right of the field for a complete list of available names. Typing any letter in a dropdown field navigates to the first value in the list that begins with that letter. For example, typing a “D” displays “Dagwell, Jason”.

0009750 - 56th St at Mueller Rd
0009750 - Bridge over Opossum Run

Submit Report

* This color background fields are mandatory
Date fields have two options. A date (mm/dd/yyyy) may be entered directly in the field or the Calendar icon may be used to find a date. Click on the Calendar icon to display the Calendar window.

Then, click on the desired date to populate the field.

Click on the Submit Report button to add the report to the Report Queue.

**Bridge Update Maintenance**
**Description:** This report contains bridge and contract activity information helpful when updating the Corporate Bridge List.

**Parameters:** Select the **Bridge Flag** from the dropdown list and click on the **Submit Report** button to add the report to the **Report Queue**.

<table>
<thead>
<tr>
<th><strong>Bridge Update Maintenance Report Parameters</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Bridge Flag</strong></td>
</tr>
<tr>
<td>E - Maintenance</td>
</tr>
<tr>
<td>N - New Bridge</td>
</tr>
<tr>
<td>O - New / Replacement bridge with sufficiency rating</td>
</tr>
<tr>
<td>R - Replacement</td>
</tr>
<tr>
<td>X - Missing Bridge Information</td>
</tr>
</tbody>
</table>

**Letting List Report – By Local**

**Description:** This report is a listing of locally designed Projects advertised for bid within a specific time frame. Projects are frequently added to or removed from this list as business decisions are made.
Parameters: Enter or select the Letting Begin Date and Letting End Date and click on the Submit Report button. The report may include more than one month. For example, enter a date range of 1/1/2010 to 1/31/2010 for a list of Projects advertised for bid during the month of January or enter a date range of 7/1/2008 to 12/31/2009 for a list of Projects advertised for bid during those months.
Date fields have two options. A date (mm/dd/yyyy) may be entered directly in the field or the Calendar icon may be used to find a date. Click on the Calendar icon to display the Calendar window.

Then, click on the desired date to populate the field.

Click on the Submit Report button to add the report to the Report Queue.

**Local Program Report – Funding Program**

**Description:** This report is a listing of locally designed Projects by selected Funding Program.

```
Local Program Report - Funding Program

<table>
<thead>
<tr>
<th>Date</th>
<th>Route &amp; Location</th>
<th>Project Status</th>
<th>Sponsor</th>
<th>District</th>
<th>RFC Date</th>
<th>Letting Date</th>
<th>Appr. Proj. Alloc.</th>
</tr>
</thead>
<tbody>
<tr>
<td>12/17/2011</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Access Roads - Construction</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1026904</td>
<td>Highway Lane, Aerial &amp; Bridge</td>
<td></td>
<td>INDOT</td>
<td></td>
<td>02/03/2017</td>
<td>09/17/2017</td>
<td>$0.00</td>
</tr>
<tr>
<td>1026905</td>
<td>Drainage Ditch Collection</td>
<td></td>
<td>INDOT</td>
<td></td>
<td>02/05/2011</td>
<td>09/10/2012</td>
<td>$0.00</td>
</tr>
<tr>
<td>1025550</td>
<td>Box Culvert Replacement</td>
<td></td>
<td>INDOT</td>
<td></td>
<td>06/11/2014</td>
<td>04/05/2011</td>
<td>$0.00</td>
</tr>
<tr>
<td>1025557</td>
<td>Bridge Deck Replacement</td>
<td></td>
<td>INDOT</td>
<td></td>
<td>02/22/2013</td>
<td>09/11/2012</td>
<td>$0.00</td>
</tr>
<tr>
<td>1025558</td>
<td>Parking Area Reconstruction</td>
<td></td>
<td>INDOT</td>
<td></td>
<td>06/01/2014</td>
<td>02/28/2011</td>
<td>$0.00</td>
</tr>
<tr>
<td>1025559</td>
<td>Intersection Improvement</td>
<td></td>
<td>INDOT</td>
<td></td>
<td>07/17/2014</td>
<td>12/17/2014</td>
<td>$3,882,000.00</td>
</tr>
</tbody>
</table>

Access Roads - Construction Appr. Proj. Allocation Total: $3,882,000.00 Project Funding Amount Total: $3,882,000.00
```

**Parameters:** Select one or multiple Funding Programs and click on the Submit Report button.
Click on the **Submit Report** button to add the report to the **Report Queue**.

**Local Program Report by Special Fund Category**

**Description**: This report is a listing of locally designed by selected Special Fund Category.
Parameters: Select one or multiple Special Fund Categories and click on the **Submit Report** button.

<table>
<thead>
<tr>
<th>Date/Year</th>
<th>Work Type</th>
<th>Route &amp; Location</th>
<th>Project Status</th>
<th>Sponsor</th>
<th>District</th>
<th>RFC Date</th>
<th>Letting Date</th>
<th>Funding Program</th>
<th>Funding Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>0930-2006</td>
<td>Emergency Relief</td>
<td>IR 1000 at bridge # 190 on CR-300 N</td>
<td>Active</td>
<td>Jackson County</td>
<td>Seymour</td>
<td>11/15/2006</td>
<td>02/13/2009</td>
<td>Funding Program</td>
<td>$8,960.00</td>
</tr>
<tr>
<td>0114-043</td>
<td>Small Structure Replacement</td>
<td>IR 1001 CR-60N over Chambers Creek</td>
<td>Active</td>
<td>Bartholomew County</td>
<td>Seymour</td>
<td>11/15/2006</td>
<td>06/05/2009</td>
<td>Funding Program</td>
<td>$65,670.00</td>
</tr>
<tr>
<td>0105-06</td>
<td>Road Reconstruction (CR Lift Start) (IR 1000 CR-600 N at bridge # 83)</td>
<td>Active</td>
<td>Bartholomew County</td>
<td>Seymour</td>
<td>11/15/2006</td>
<td>05/04/2009</td>
<td>Funding Program</td>
<td>$397,283.00</td>
<td></td>
</tr>
<tr>
<td>0105-06</td>
<td>Median Protection (Construction) (IR 1000 Old SR-37 N at bridge # 6)</td>
<td>Active</td>
<td>Monroe County</td>
<td>Seymour</td>
<td>11/15/2006</td>
<td>05/04/2009</td>
<td>Funding Program</td>
<td>$17,771.00</td>
<td></td>
</tr>
<tr>
<td>0114-06</td>
<td>New BR/PSO &amp; S/Cloud Cnnct (IR 1001 2000 2000 W CH 70/70 (20' 70'70))</td>
<td>Active</td>
<td>Bloomington</td>
<td>Seymour</td>
<td>11/15/2006</td>
<td>05/04/2009</td>
<td>Funding Program</td>
<td>$17,331.00</td>
<td></td>
</tr>
<tr>
<td>0114-08</td>
<td>Traffic Signal Replacement</td>
<td>ST 1001 0.64 Miles N of SR-46, 8th at Central; 8th at Central</td>
<td>Active</td>
<td>Crawford County</td>
<td>Seymour</td>
<td>11/15/2006</td>
<td>06/06/2009</td>
<td>Funding Program</td>
<td>$63,737.00</td>
</tr>
<tr>
<td>0114-08</td>
<td>Bus Lanes Replacement</td>
<td>ST 1001 2.36 Miles N of SR-46 on Indianapolis Road</td>
<td>Active</td>
<td>Crawford County</td>
<td>Seymour</td>
<td>11/15/2006</td>
<td>06/06/2009</td>
<td>Funding Program</td>
<td>$326,169.99</td>
</tr>
<tr>
<td>0114-08</td>
<td>Pavement Replacement</td>
<td>ST 1001 0.9 Miles W of Central Dr. W to Ir 21 Mils W of Central Dr W</td>
<td>Active</td>
<td>Crawford County</td>
<td>Seymour</td>
<td>11/15/2006</td>
<td>06/06/2009</td>
<td>Funding Program</td>
<td>$13,388.95</td>
</tr>
<tr>
<td>0114-08</td>
<td>Storm Drain Correction</td>
<td>IR 1001 1.26 Mils N of Nelson Rd and CR-252</td>
<td>Active</td>
<td>Johnson County</td>
<td>Seymour</td>
<td>11/15/2006</td>
<td>06/06/2009</td>
<td>Funding Program</td>
<td>$63,807.60</td>
</tr>
<tr>
<td>0114-08</td>
<td>Patch And Repair Bridge Pavement 51IR 1001 0.20 Mils N of SR-46 at 175 E Hurricane St</td>
<td>Active</td>
<td>Indiana Department of Tr. Seymour</td>
<td></td>
<td>11/15/2006</td>
<td>05/05/2009</td>
<td>Funding Program</td>
<td>$7,105.00</td>
<td></td>
</tr>
<tr>
<td>0114-08</td>
<td>Bridge Replacement Bridge Pavement 51IR 1001 0.37 Miles N of SR-37 and County Road 144</td>
<td>Active</td>
<td>Johnson County</td>
<td>Seymour</td>
<td>11/15/2006</td>
<td>05/05/2009</td>
<td>Funding Program</td>
<td>$17,510.79</td>
<td></td>
</tr>
<tr>
<td>0114-08</td>
<td>Other Type Project (Low Speed Road and surrounding area; 6.5 miles N of IR 1001)</td>
<td>Active</td>
<td>Brown County</td>
<td>Seymour</td>
<td>11/15/2006</td>
<td>05/05/2009</td>
<td>Funding Program</td>
<td>$1,202,525.85</td>
<td></td>
</tr>
</tbody>
</table>

Click on the **Submit Report** button to add the report to the **Report Queue**.
Call Application

Select **Call Application** Report to begin and **Call Application Report Parameters** is displayed.

In the above display, select **Use Des Basket** or **Use Search Values**. Select a specified Des # and click the **Submit Report** button and the Des # is displayed in the Report Queue. View the details by clicking on the **View Details** Icon or Remove the Report by clicking on the **Remove Report** Icon. To review the report click on the **View Report** Icon and the report is displayed.
After the report is submitted, the Status will state Queued, when the report is ready, the Status will state Complete and the report is ready to be viewed.

PS&E Report

Select PS & E Report to begin and PS & E Report Parameters is displayed
Select Report:

- Full Project Listing
- Activity Log
- Project Log
- Letting List Report - By Date Range
- Letting List Report - By District
- Letting List Report - By Single Date
- Project Cost Estimate Log
- Bridge Update Maintenance
- Letting List Report - By Local
- Local Program Report - Funding Program
- Local Program Report - Special Fund Category
- Call Application
- PS & E
- Missing Project Numbers Report
- Call Work Area Executive Report - Projects to Include By Asset Team
- Call Work Area Executive Report - Projects to Eliminate By Asset Team
- Call Work Area Executive Report - Projects to Include By District
- Call Work Area Executive Report - Projects to Eliminate By District
- Call Work Area Executive Report - Projects to Include By Grade
- Call Work Area Executive Report - Projects to Eliminate By Grade
- Des Changes

PS & E Report Parameters

| Letting Begin Date | 05/01/2011 | MM/DD/YYYY |
| Letting End Date   | 07/31/2011 | MM/DD/YYYY |

Submit Report

* This color background fields are mandatory
Date fields have two options. A date (mm/dd/yyyy) may be entered directly in the field or the Calendar icon may be used to find a date. Click on the Calendar icon to display the Calendar window.

Then, click on the desired date to populate the field.

Click on the **Submit Report** button to add the report to the **Report Queue**.
# Missing Project Numbers Report

**Description:** This report is a listing of projects with missing Federal Project numbers.
### Missing Project Numbers

<table>
<thead>
<tr>
<th>Contract</th>
<th>Designation #</th>
<th>Contract</th>
<th>Designation #</th>
<th>Contract</th>
<th>Designation #</th>
</tr>
</thead>
<tbody>
<tr>
<td>0401405</td>
<td>0901464</td>
<td>0901464</td>
<td>1000793</td>
<td></td>
<td></td>
</tr>
<tr>
<td>0600537</td>
<td>0902194</td>
<td>0902200</td>
<td>1000823</td>
<td></td>
<td></td>
</tr>
<tr>
<td>0710247</td>
<td>0902262</td>
<td>1000825</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>0710273</td>
<td>0902262</td>
<td>1000827</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>0710463</td>
<td>0902315</td>
<td>1000828</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>0800024</td>
<td>0902326</td>
<td>1000829</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>0800529</td>
<td>0902329</td>
<td>1000829</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>0800585</td>
<td>0902330</td>
<td>1000826</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
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**Parameters:** There are no parameters to select for this report; click the **Submit Report** button to add the report to the Report Queue.

Click on the **Submit Report** button to add the report to the **Report Queue**.

### Call Work Area Executive Report – Projects to Include by Asset Team
**Description:** This report is a listing of projects in a Call Work Area that are recommended for a specific Program Year. The projects are grouped by Asset Team and sorted by Call Year (starting with the selected Call Year and then all future Call Years), then sorted by selected Asset Team(s) and by Grade within the Asset Team.

**Parameters:** Select a Call Year and one or multiple Asset Groups and click on the **Submit Report** button.

Click on the **Submit Report** button to add the report to the **Report Queue**.

**Call Work Area Executive Report – Projects to Eliminate by Asset Team**

**Description:** This report is a listing of projects in a Call Work Area that are recommended to exclude for a specific Program Year. The projects are grouped by Asset Team and sorted by Call Year (starting with the selected Call Year and then all future Call Years), then sorted by selected Asset Team(s) and by Grade within the Asset Team.
Parameters: Select a Call Year and one or multiple Asset Groups and click on the Submit Report button.

Call Work Area Executive Report – Projects to Include by District

Description: This report is a listing of projects in a Call Work Area that are recommended for a specific Program Year. The report is grouped by District and then sorted by Call Year, then Asset Team and then Grade.
Parameters: Select a Call Year and one or multiple Districts and click on the Submit Report button.

Call Work Area Executive Report - Projects to Include By District Report Parameters

Call Year

Crawfordsville
Fort Wayne
Greenfield
LaPorte
Seymour
Toll Road
Vincennes
Multiple Districts

Submit Report

* This color background fields are mandatory

Click on the Submit Report button to add the report to the Report Queue.

Call Work Area Executive Report – Projects to Eliminate by District

Description: This report is a listing of projects in a Call Work Area that are recommended to exclude for a specific Program Year. The projects are Grouped by District and sorted by Call Year (starting with the selected Call Year and then all future Call Years), then sorted by selected Asset Team(s) and by Grade within the Asset Team.
Parameters: Select a Call Year and one or multiple Districts and click on the Submit Report button.

Call Work Area Executive Report - Projects to Eliminate By District Report Parameters

Call Year

Crawfordsville
Fort Wayne
Greenfield
LaPorte
Seymour
Toll Road
Vincennes
Multiple Districts

Submit Report

* This color background fields are mandatory

Click on the Submit Report button to add the report to the Report Queue.

Call Work Area Executive Report – Projects to Include by Grade

Description: This report is a listing of Call Year projects to include for a specific Program Year sorted by Call Year and Grade.
Parameters: Select a Call Year and click on the Submit Report button.

**Call Work Area Executive Report - Projects to Include By Grade Report Parameters**

**Call Year**

*This color background fields are mandatory*

Click on the Submit Report button to add the report to the Report Queue.

**Call Work Area Executive Report – Projects to Eliminate by Grade**

**Description:** This report is a listing of Call Year projects to exclude for a specific Program Year sorted by Call Year and Grade.

**Parameters:** Select a Call Year and one click on the Submit Report button.

**Call Work Area Executive Report - Projects to Eliminate By Grade Report Parameters**

**Call Year**

*This color background fields are mandatory*
Click on the **Submit Report** button to add the report to the **Report Queue**.

### Des Changes

**Description:** This report is a listing of specific Des information that has been added, deleted, or changed between a selected time periods. Fields that are tracked are Asset Group, Project Status, Program Year, Letting Finish Date, Estimate fields, Program Tab fields, Appropriation Tab fields and the Project Log.

![Des Changes Report Parameters](image)

Click on the **Submit Report** button to add the report to the **Report Queue**.
### Viewing, Saving and Printing a Report

In the **Report Queue** click the **PDF** icon to the right of the Report to view it.

When the Report displays in the Adobe Reader window, click on the **Save** icon to save the PDF document to your local machine or network drive. Click on the **Print** icon to print the Report.
Removing a Report

To remove a Report from the **Report Queue**, click on the **Delete** icon next to the Report to be removed.

The Report is removed from the **Report Queue**.

Des Basket

**Working with the Des Basket**

The Des Basket is a convenient place to store a list of Projects frequently accessed. It is similar to Favorites in a Web browser. The Des Basket has links to the **Project Maintenance Main Page** and the Full Project Listing Report. Designation Numbers in the Des Basket are sorted numerically in ascending order.

Access to menu selections, icons and features is dependent on a User’s role and security level. For details, refer to **Understanding the Screen** in the Getting Started section.

**To Add Projects to the Des Basket**

Projects are added to the Des Basket from the **Search Results Panel** on the **Project Search** screen.

Click on the **Des Basket** icon to the right of the record to add the Project to the Des Basket. Clicking on the **Des Basket** icon in the **Search Results Panel** title bar adds all the Projects in the **Search Results Panel** to the Des Basket.

The Des Basket holds a maximum of 200 Designation Numbers. An error message displays if the maximum has been reached.

The **Add All to Des Basket** icon in the title bar (next to the Excel icon) may be used to add all records returned in the **Search Results Panel**. However, if the **Search Results Panel** contains more than 200
Projects, they are added to the Des Basket until the maximum is reached. A message displays with notification that only the first 200 Projects have been added to the Des Basket.

The Des Basket appears at the bottom of the SPMS menu. The list may be opened or closed by clicking on the Maximize and Minimize buttons.

Click on the Des Maintenance icon to the right of the Project’s Designation Number to open the Project Maintenance Main Page and manage the Project.
Click on the **Full Project Listing Report** icon to the right of the Project’s Designation Number to open the Full Project Listing Report for that Project.
To remove a Project from the Des Basket, click on the Remove 🗑️ icon to the right of the Designation Number.

To remove all Projects from the Des Basket, click on Clear All.
## Addendum – Release 4.1 Summary

<table>
<thead>
<tr>
<th>Date</th>
<th>Section</th>
<th>New/Update</th>
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<tbody>
<tr>
<td>12/16/2011</td>
<td>Capital Budgeting – Call Work Area</td>
<td>New Feature</td>
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<tr>
<td>12/16/2011</td>
<td>Capital Budgeting – Change Management</td>
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</tr>
<tr>
<td>12/16/2011</td>
<td>Mandatory Log Entry on Letting Date Changes</td>
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<tr>
<td>12/16/2011</td>
<td>Copy of Letting, Contract Award, Final Evaluation Activities, Start Date, Finish Date and Start Status from Lead Des to Child Des’s</td>
<td>New Feature</td>
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<tr>
<td>12/16/2011</td>
<td>New Route Transfer, Transfer Code, Transfer Type fields</td>
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<tr>
<td>12/16/2011</td>
<td>Copy of Contract Prefix and Work Category from Lead Des to Child Des’s</td>
<td>New Feature</td>
</tr>
<tr>
<td>12/16/2011</td>
<td>Auto Notification messages for Railroad and Utility</td>
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</tr>
<tr>
<td>12/16/2011</td>
<td>Local Program Reports by Funding Program and by Special Fund Category</td>
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<tr>
<td>12/16/2011</td>
<td>My Tasks – Activity Search</td>
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## Addendum – Release 4.0 Summary

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<th>Date</th>
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<td>8/12/2011</td>
<td>Combined Home Search and Advanced Search screens into one</td>
<td>Updates</td>
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<tr>
<td>8/12/2011</td>
<td>Added Small Structure field</td>
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<td>8/12/2011</td>
<td>Call Application</td>
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<td>8/12/2011</td>
<td>My Tasks and My Tasks by Person</td>
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<tr>
<td>8/12/2011</td>
<td>Announcements</td>
<td>Updates</td>
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<td>8/12/2011</td>
<td>Applied a link to Contract No. in Project Header that displays all Des’s on the Contract.</td>
<td>New Feature</td>
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<td>8/12/2011</td>
<td>Full Project Listing – Expanded Funding Program</td>
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<td>Save Search</td>
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<td>8/12/2011</td>
<td>PS&amp;E Report</td>
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