4205 N. Lincoln Blvd. | OKC

# PROJECTTRACKER GUIDEBOOK

## UNIFIED PLANNING WORK PROGRAM

### TASK 1.02 | SUBTASK 2C

**AUGUST 2022**

**2022**
acog

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# ACCOUNT SET UP AND LOG IN

## NEW USER

Go to [https://portal.acogok.ecointeractive.com/](https://portal.acogok.ecointeractive.com/) and click "**Sign Up**" on the main log in page.



**Figure 1:** ProjectTracker Home Page

**Figure 2:** New User sign-up form

Enter in the required information on the sign-up form.

- For the **Organization**, select what your lead agency is.

- For the **Requested Plans**, select the "**Select All**" to select the available ACOG Plans.



**Figure 3:** Requested Plans options

- For the **Requested Access Level**, select the "**Sponsor**" option.



**Figure 4:** Requested Access Level options

- For the **Requested Project Access**, select the "**My Organization's Projects**".



**Figure 5:** Requested Project Access options



**Figure 6:** Selected form options

- Complete the CAPTCHA verification.

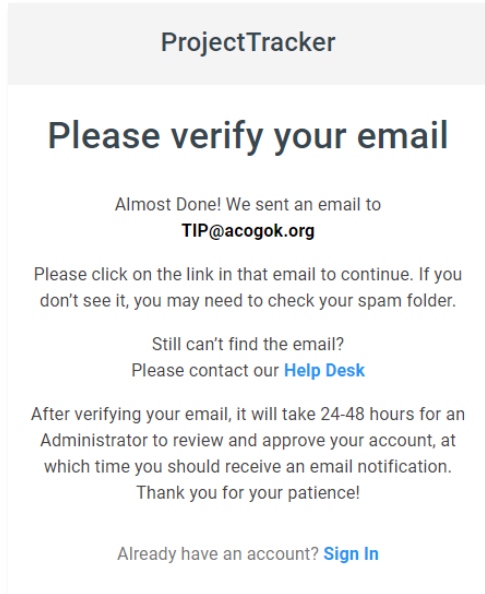Once the system receives your sign-up request, an email will be sent for verification.
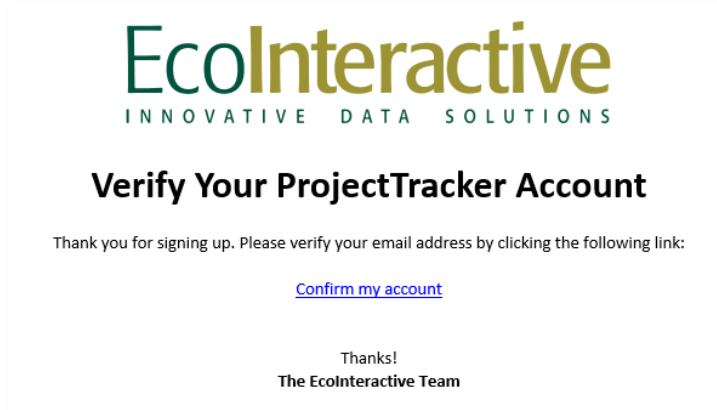


**Figure 7:** Verify your email



**Figure 8:** Verify your ProjectTracker account

Once the system administrator approves your sign-up request, you will be able to login into the system and begin using it.
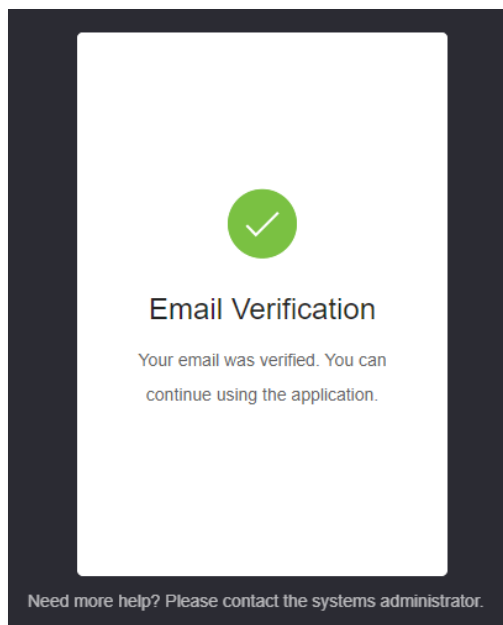


**Figure 9:** Email verification notification

## RETURNING USER

Go to https://portal.acogok.ecointeractive.com/ and enter in your log in information.
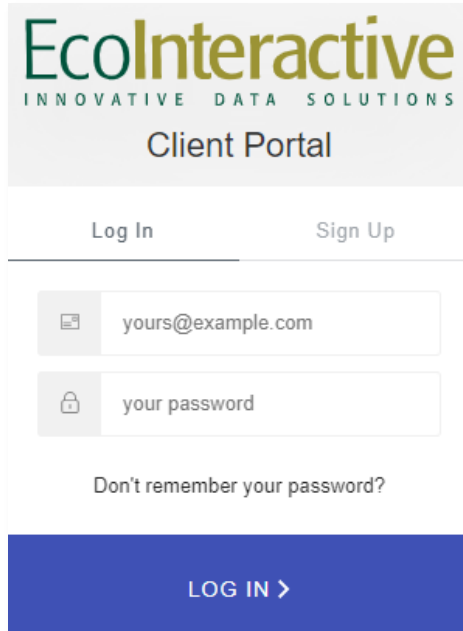


**Figure 10:** ProjectTracker log in page

After the log in, the home page/Dashboard will appear.
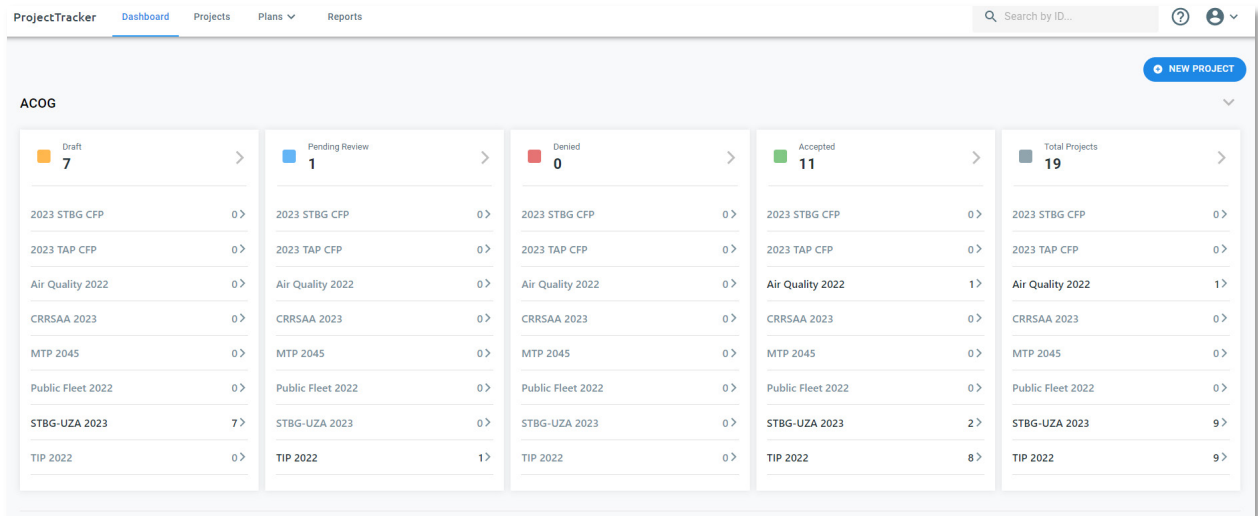


**Figure 11:** ProjectTracker home page and dashboard

# NAVIGATING THE DASHBOARD

## HOME PAGE AND DASHBOARD TAB

The home page on ProjectTracker is the Dashboard.  The **Dashboard** tab will also bring you to the home page.  The Dashboard will show all relevant projects to you, sorted by current status and plan cycle.  The status of a project indicates where that project is along the review and approval process.

- **Draft** – indicates that updates or edits are still being made to projects as part of a revision.
- **Pending Review** – indicates a project has been submitted for review by ACOG staff.
- **Denied** – indicates that ACOG staff have denied the updates submitted.  A denial comment will be provided explaining the reason for denial.  Sponsors can re-submit the project from the denial section after making the appropriate updates.
- **Accepted** – indicates projects that have been review by MPO staff and approved to be included within the specified revision.
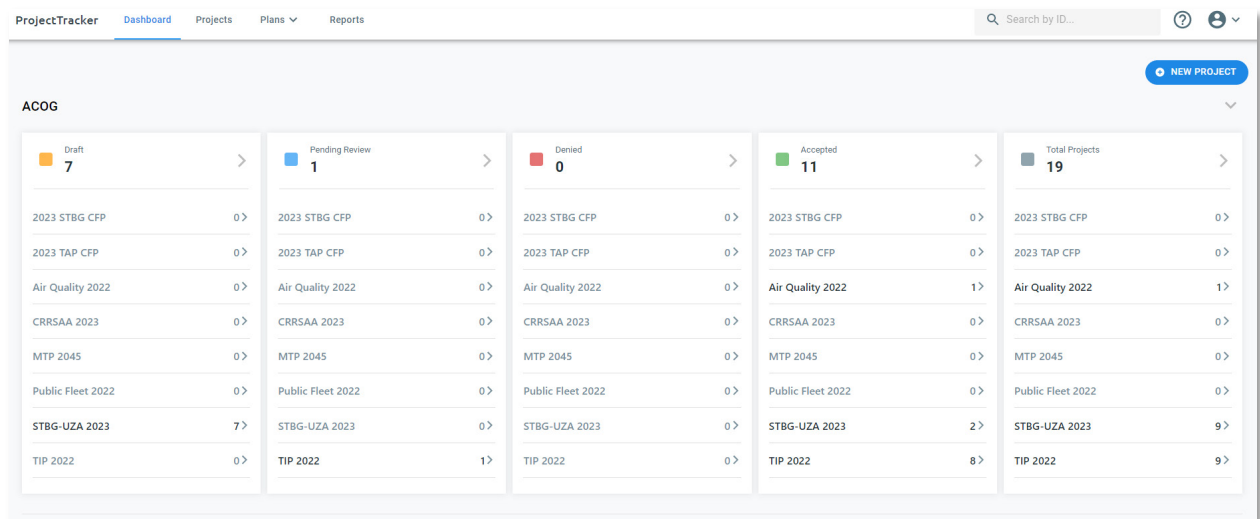- **Total Projects** – indicates all the projects from the previous 4 categories.



**Figure 12:** ProjectTracker home page and dashboard

## PROJECTS TAB

Clicking on the **Projects** tab will bring you to an overview of all (relevant to you) projects.  In this overview, you can sort projects by the status they are in or filter the results using the advanced search function on the left-hand side of the page.

Clicking on any project will take you to a project details page where you can review the full details related to the project.  If the project is in "Draft" or "Denied" status, edits can be made directly to the project.  If the project has been "Accepted", the project can be amended as part of a separate revision.

In the top right-hand side of the page, you will find an EXPORT button that will export the displayed list if projects in an Excel format. Clicking on the NEW PROJECT button will bring up the Creating a New Project options. The three dots button brings up the option for Bulk Actions. The Bulk Actions option allows multiple projects to be selected to be deleted, update their status, or carry-over.
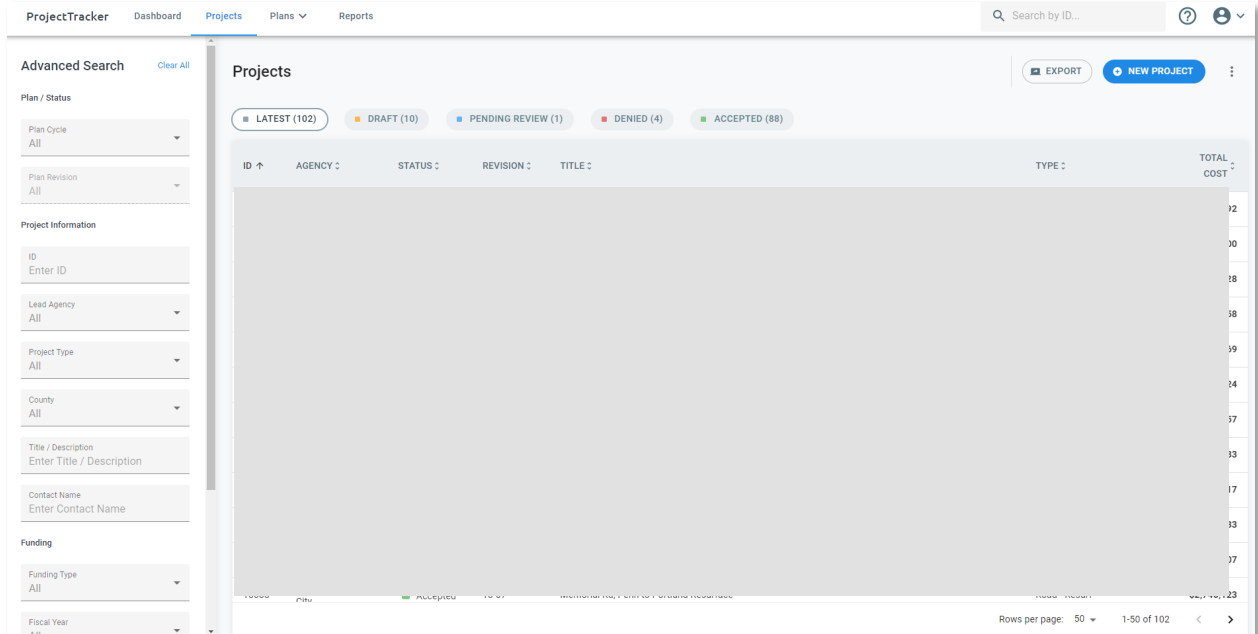


**Figure 13:** Projects tab view

## PLANS TAB

Clicking on the **Plans** tab will bring up 2 options: **Plan Revisions** and **Plan Cycle**. The Plans Revisions shows an over of all Plan Revisions.
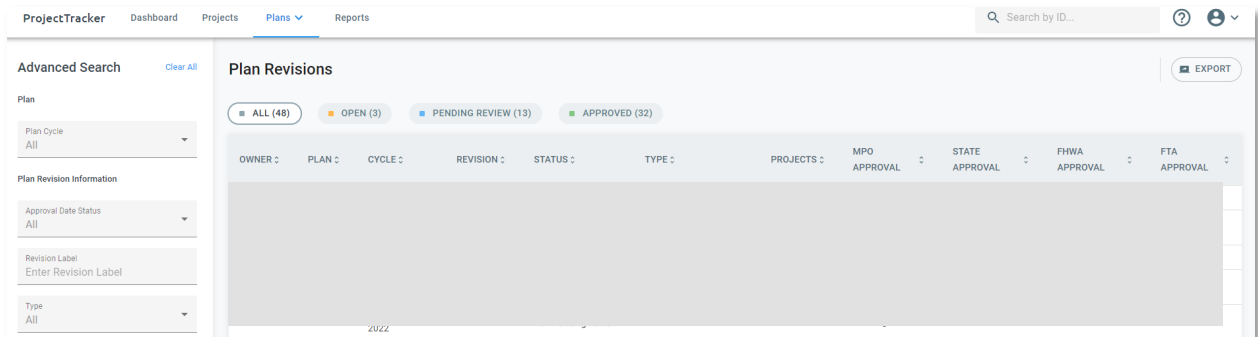


**Figure 14:** Plans Revisions view

The Plan Cycles shows all the plan cycles on ProjectTracker.



**Figure 15:** Plan Cycles view

## REPORTS TAB

Clicking on the **Reports** tab will bring you to the reports section.  Here you will have a variety of reports at your disposal to pull necessary information of all projects relevant to you.  Utilize the "Report Filters" on the right-hand side of the page in order to narrow or broaden your reports.  When viewing a report, you will have the option to export as an Excel file or print an overview on certain reports.



**Figure 16:** Reports tab view

## THE SEARCH TOOL

Users can search for a project in the search bar using the TIP ID or JP number.

# CALL FOR PROJECTS (CFP) SUBMISSION PROCESS

## CREATING A NEW APPLICATION

On the Dashboard, click on the **NEW PROJECT** button on the right-hand side.
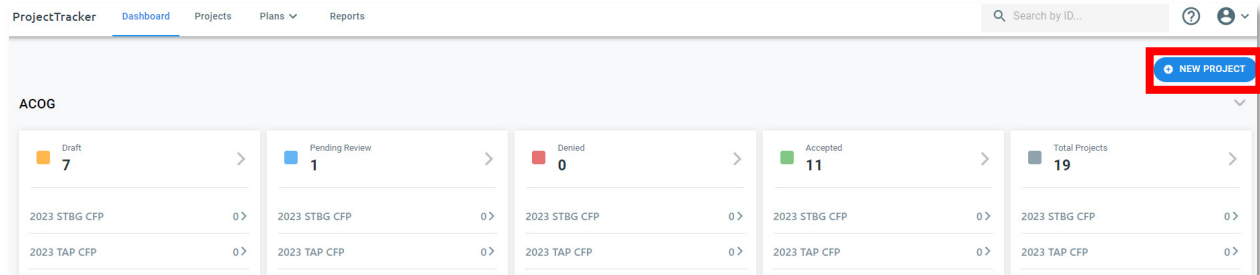
**Figure 17:** ProjectTracker Dashboard and main page

The "Creating a New Project" option will appear.
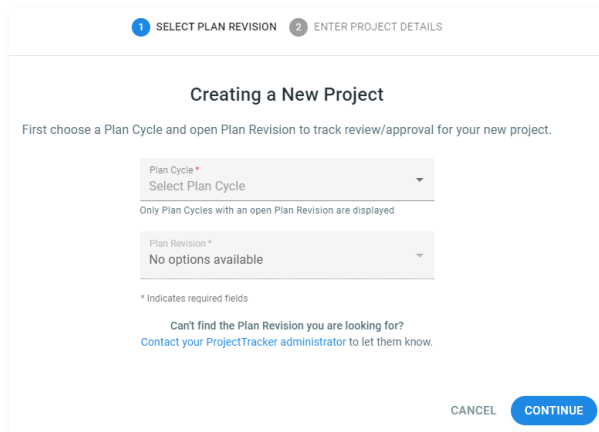
**Figure 18:** Create a New Project

For the **Plan Cycle,** select the Call for Project option that you are applying for.

**Figure 19:** Plan Cycle drop down options

For the **Plan Revision,** select the only available option.
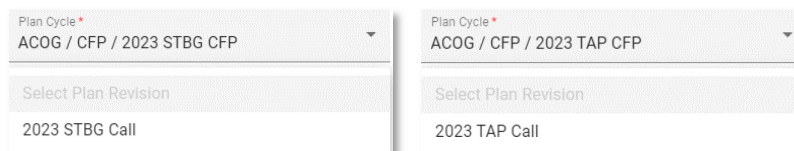
**Figure 20:** Plan Revision drop down option

## CREATING A NEW STBG-UZA APPLICATION

For the Plan Cycle, select **ACOG/CFP/2023 STBG CFP** and **2023 STBG Call** for the Plan Revision.  Once you have selected the **Plan Cycle** and the **Plan Revision,** click the **CONTINUE** button.



**Figure 21:** STBG-UZA option example

Fill out the required information: Title, Project Type, Lead Agency, and Description.  The ID field is not required to create the new project.  The system will automatically generate an ID.  Once you have inputted all the required information, click on the **CREATE PROJECT** button.



**Figure 22:** Blank new project



**Figure 23:** New project filled out example

Once you have created a project, the system will automatically take you the PROGRAMMING tab of the new project.  On this tab, you will be able to add further details related to the project.  When a project is first created, it will automatically be placed in a "Draft" status until submitted.  Remember to click **SAVE CHANGES** when you are done editing a project or ready to submit the project for review.  Any time the **SAVE CHANGES** is clicked, the **EDIT** button must be clicked in order to start editing the information.

**Figure 24:** Initial example project after it has been created



**Figure 25:** Available tabs

Fill out the required information.  For the **Capacity** option, select **No** if the project is not increasing the road capacity.  For the **TCM** option, select **No** if the project will not be used for Traffic Control Management.



**Figure 26:** Initial data after project has been created

Click on the **ADD NEW LOCATION** button to add a section for location information. Fill in the applicable location information. Multiple locations maybe added if need.



**Figure 27:** Initial location information



**Figure 28:** Location Information options

Click the **ADD ROW** to add a section for funding information. Select the funding year (FY) that you are applying for. If the funding year is not one of the ones that is being used for the call for projects, it will not be accepted. **The funding year must match the funding year on the Excel application.** If the application years do not match, the application will not be accepted.

Only put in the construction cost and the local match (if applicable) in the **CON** (Construction) column. If the project is a Transit project, then put the funding amount(s) in the **IMP** (Implementation) column. If there are funding amounts in the wrong columns or in addition to the CON or IMP column, the project will not be accepted.

For the **FUND TYPE**, select **STBG-Urban** if you are applying for the 80/20 part of the STBG-UZA funding. Add another row and select **Local Match** to add the 20% local match. If you are applying for the STBG-UZA Safety portion of the funding, select **STBG-Urban Safety**. The second row is not necessarily for the 100% funded safety project.



**Figure 29:** Initial funding information

**Figure 30:** Initial funding information after adding two rows



**Figure 31:** Funding information example for the 80/20

Save the changes often and before moving to a different tab.



**Figure 32:** Save changes location

When you are ready to add more edits to the project or move to a different tab, select the EDIT button.



**Figure 33:** Edit button location

The **MAP** tab is used to draw the location(s) of the project.  Point(s), line(s), and polygon(s) are the available features that maybe used to show the location(s) of the project.



**Figure 34:** Initial MAP tab view

Select the feature(s) that would be best to use to represent the location(s) of the project. The selectable features and map navigation tools are located on the top right side of the map in the white box.  After selecting a drawing feature, click on the starting location of the project and keep adding features till the location(s) have been completed.  Use the undo or redo options as needed.  Drawn feature maybe deleted as well.  **BE SURE TO SAVE THE CHANGES BEFORE LEAVING THE MAP TAB.**
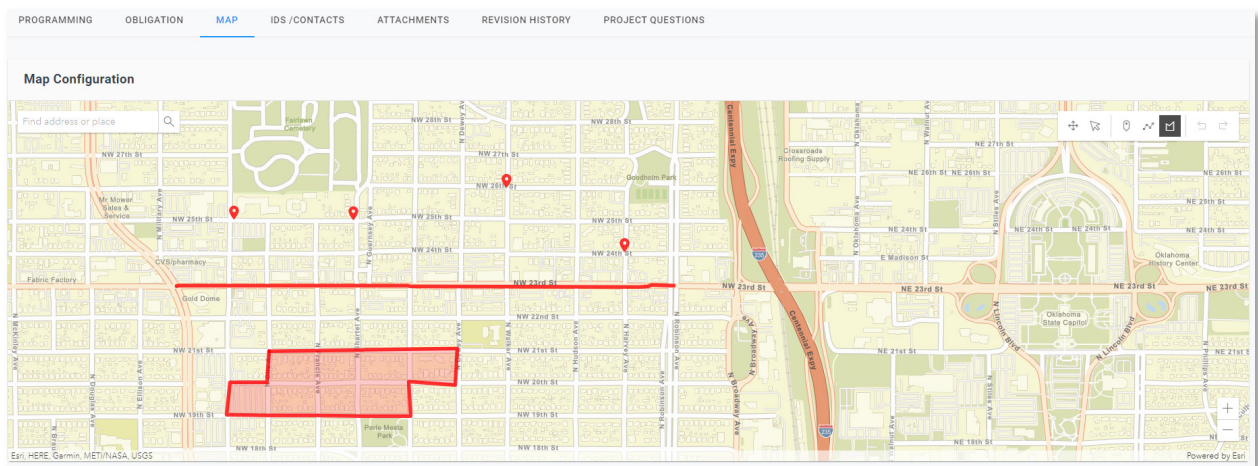


**Figure 35:** Drawing features examples

The **ATTACHMENTS** tab is where the required application documents can be uploaded and stored for the project application. Files maybe drag dropped into the box or searched for instead.
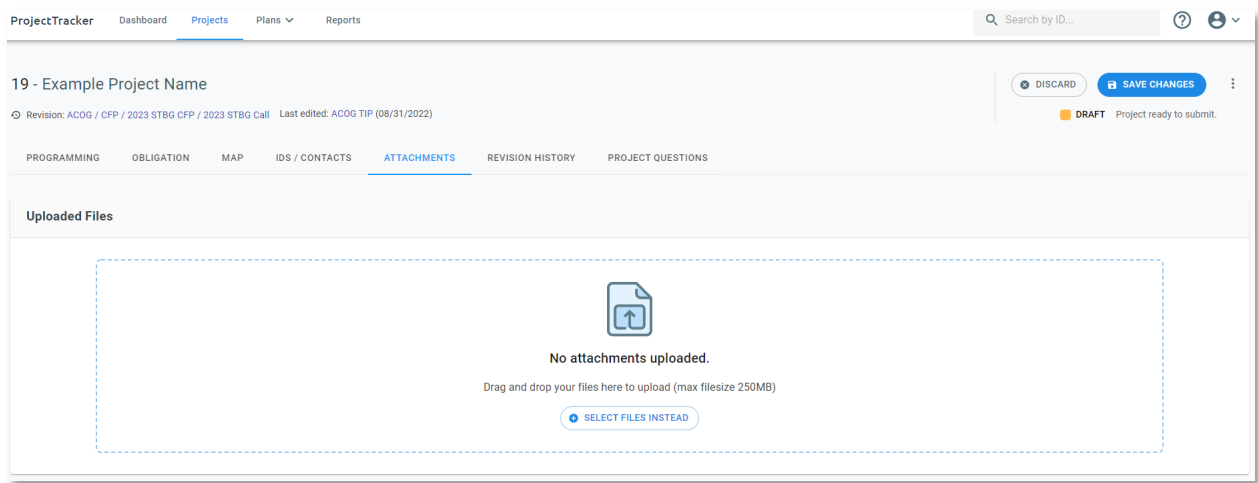


**Figure 36:** Initial ATTACHMENTS tab view

Upload all the required application documents and select an appropriate document type. If the project was not mapped in the MAP tab, a zipped folder containing a shapefile or a KML file will be accepted. A PDF or jpg of the location(s) will not be accepted and the project will be rejected. See the appropriate guidebook for the required documents that must be submitted.

For the STBG-UZA grant, the required uploaded documents are:

- **Pre-application Survey for ACOG's Transportation Grants**
- **Project Rating Worksheet(s)**
- **ODOT Scoping Form**
- **STBG-UZA Programming Resolution**
- **Itemized Cost Estimate**
- **Shapefile or KML file of the location(s)** (upload only if the project was not mapped in ProjectTracker)
- **Supporting documentation**
  - Traffic counts
  - PCI or pavement coring sample results
  - Bridge sufficiency ratings
  - Applicable crash data
  - Complete Streets exemption form (if applicable)

**Figure 37:** Example uploaded attachments



**Figure 38:** Example of saved attachments

On the **PROJECT QUESTIONS** tab, fill out the applicable questions.  The answers provided are checked with the other application documents to make sure the project is consistent throughout the application.



**Figure 39:** Initial PROJECT QUESTIONS tab

Once the application has been filled out, all the required documents have been uploaded, and the changes have been saved, select the **SUBMIT FOR REVIEW** button.  Once the project has been submitted, it's status will be changed from DRAFT to PENDING REVIEW.
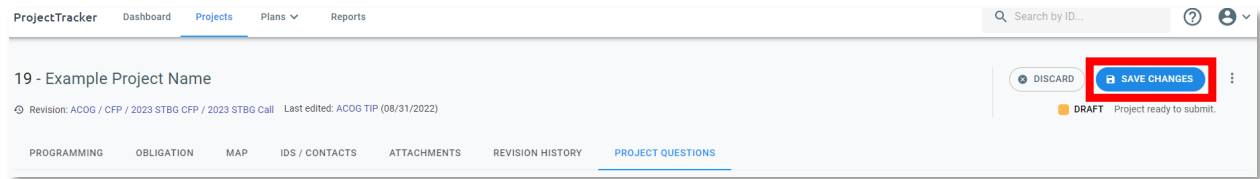


**Figure 40:** Submit for review button

## CREATING A NEW TAP APPLICATION

For the Plan Cycle, select **ACOG/CFP/2023 TAP CFP** and **2023 TAP Call** for the Plan Revision.  Once you have selected the **Plan Cycle** and the **Plan Revision,** click the **CONTINUE** button.



**Figure 41:** TAP option example

Fill out the required information: Title, Project Type, Lead Agency, and Description.  The ID field is not required to create the new project.  The system will automatically generate an ID. Once you have inputted all the required information, click on the **CREATE PROJECT** button.



**Figure 42:** Blank new project



**Figure 43:** New project filled out example

Once you have created a project, the system will automatically take you the **PROGRAMMING** tab of the new project.  On this tab, you will be able to add further details related to the project.  When a project is first created, it will automatically be placed in a "Draft" status until submitted.  Remember to click **SAVE CHANGES** when you are done editing a project or ready to submit the project for review.  Any time the **SAVE CHANGES** is clicked, the **EDIT** button must be clicked in order to start editing the information.

**Figure 44:** Initial example project after it has been created



**Figure 45:** Available tabs

Fill out the required information. For the **Capacity** option, select **No** if the project is not increasing the road capacity. For the **TCM** option, select **No** if the project will not be used for Traffic Control Management.



**Figure 46:** Initial data after project has been created

Click on the **ADD NEW LOCATION** button to add a section for location information. Fill in the applicable location information. Multiple locations maybe added if need.



**Figure 47:** Initial location information



**Figure 48:** Location Information options

Click the **ADD ROW** to add a section for funding information. Select the funding year (FY) that you are applying for. If the funding year is not one of the ones that is being used for the call for projects, it will not be accepted.

Only put in the construction cost and the local match in the **CON** (Construction) column. If there are funding amounts in the wrong columns or in addition to the CON column, the project will not be accepted.

For the **FUND TYPE**, select **Transportation Alternative Program** for the 80% part of the TAP funding. Add another row and select **Local Match** to add the 20% local match.



**Figure 49:** Initial funding information



**Figure 50:** Initial funding information after adding two rows

**Figure 51:** Funding information example for the 80/20

Save the changes often and before moving to a different tab.
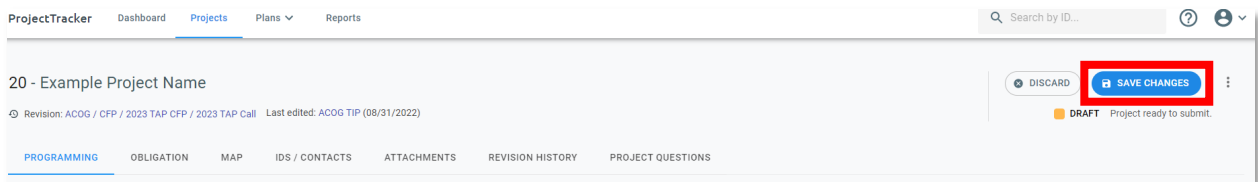


**Figure 52:** Save changes location

When you are ready to add more edits to the project or move to a different tab, select the EDIT button.
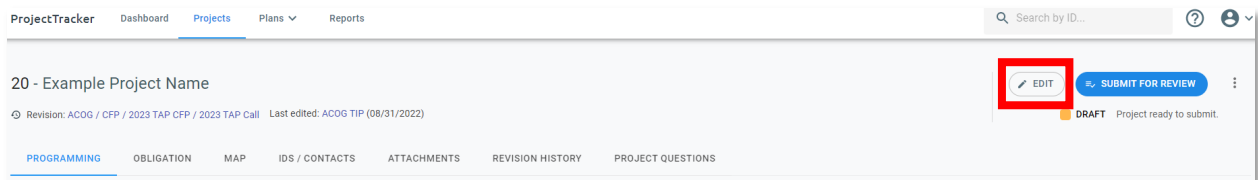


**Figure 53:** Edit button location

The **MAP** tab is used to draw the location(s) of the project.  Point(s), line(s), and polygon(s) are the available features that maybe used to show the location(s) of the project.
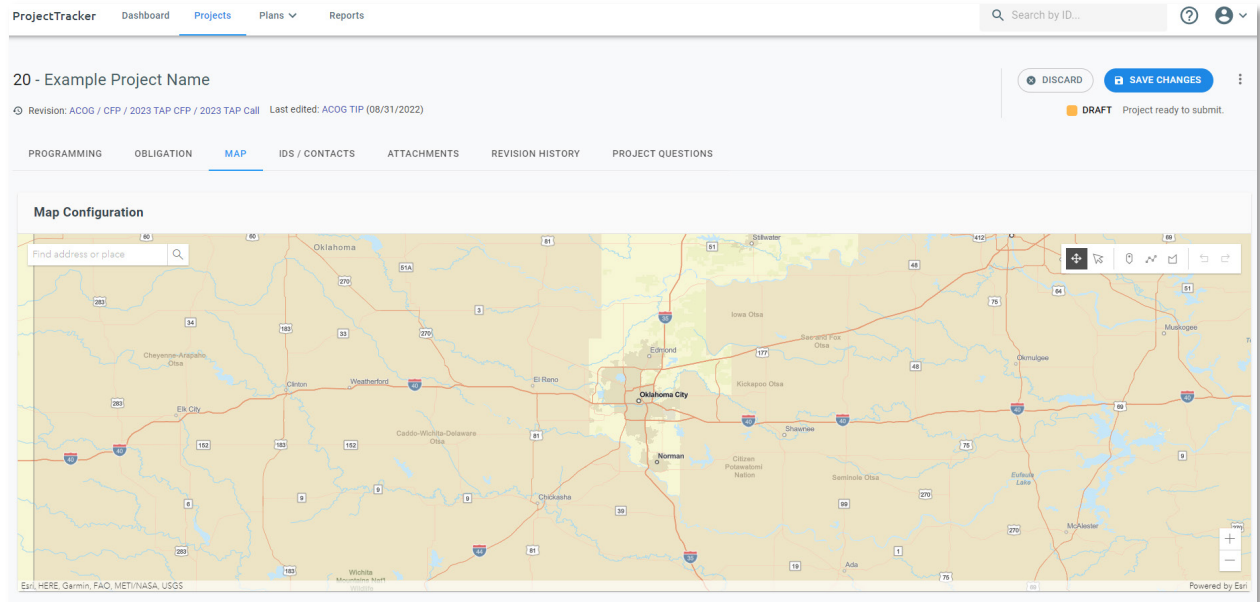
**Figure 54:** Initial MAP tab view

Select the feature(s) that would be best to use to represent the location(s) of the project. The selectable features and map navigation tools are located on the top right side of the map in the white box. After selecting a drawing feature, click on the starting location of the project and keep adding features till the location(s) have been completed. Use the undo or redo options as needed. Drawn feature maybe deleted as well. **BE SURE TO SAVE THE CHANGES BEFORE LEAVING THE MAP TAB.**



**Figure 55:** Drawing features examples

The **ATTACHMENTS** tab is where the required application documents can be uploaded and stored for the project application. Files maybe drag dropped into the box or searched for instead.

**Figure 56:** Initial ATTACHMENTS tab view

Upload all the required application documents and select an appropriate document type. See the appropriate guidebook for the required documents that must be submitted.

For the TAP grant, the required uploaded documents are:

- **Pre-application Survey for ACOG's Transportation Grants**
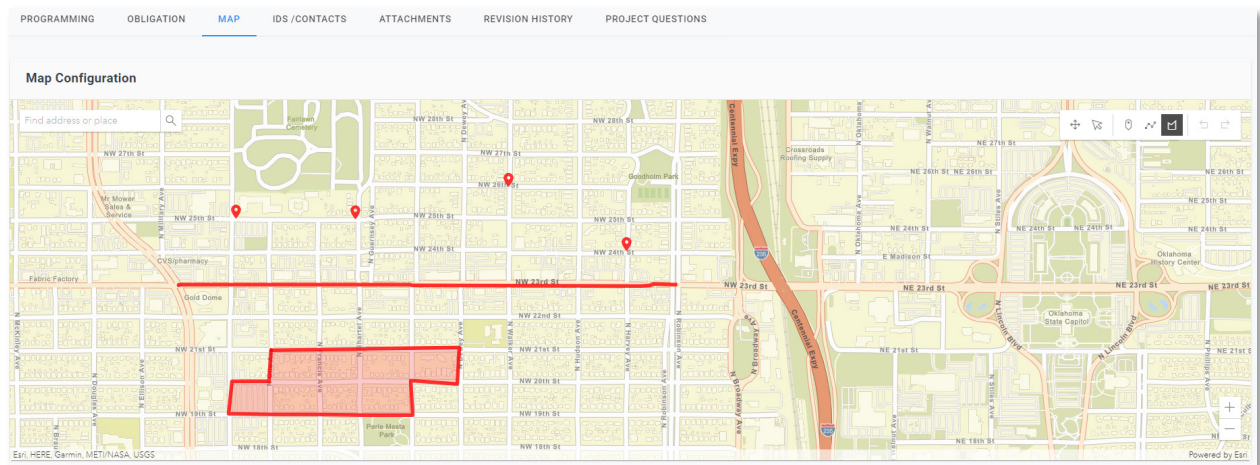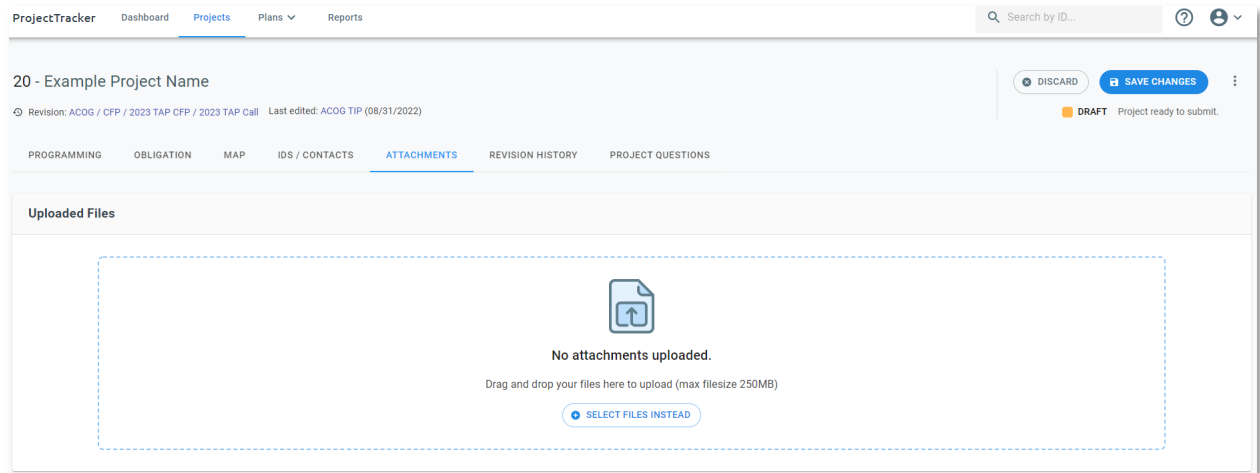
- **Project location map showing street names, project limits, and north arrow**

- **Signed letter(s) of support (letters must be specific to the proposed TAP project and may be from any involved stakeholders, partners, or organizations)**

- **Preliminary cost estimate/project budget (must be no older than 6 months prior to the date of the resolution and updated as needed to be current within 6 months of the date of application submission)**

- **Signed maintenance plan**

- **Detailed timeline and work plan**

- **Plan for gathering evaluation metrics**

- **Adopted resolution (with original signatures or a certified copy). An agenda item for an upcoming public meeting will be accepted as long as final adopted resolution is provided before project selection. The resolution should describe the location of the project, type of improvement, total project cost, and source(s) of funds.**

- **Scoring criteria worksheet**

- **ODOT scoping and site plan forms**

**Figure 57:** Example uploaded attachments



**Figure 58:** Example of saved attachments

On the **PROJECT QUESTIONS** tab, fill out the applicable questions.  The answers provided are checked with the other application documents to make sure the project is consistent throughout the application.



**Figure 59:** Initial PROJECT QUESTIONS tab

Once the application has been filled out, all the required documents have been uploaded, and the changes have been saved, select the **SUBMIT FOR REVIEW** button.  Once the project has been submitted, it's status will be changed from DRAFT to PENDING REVIEW.
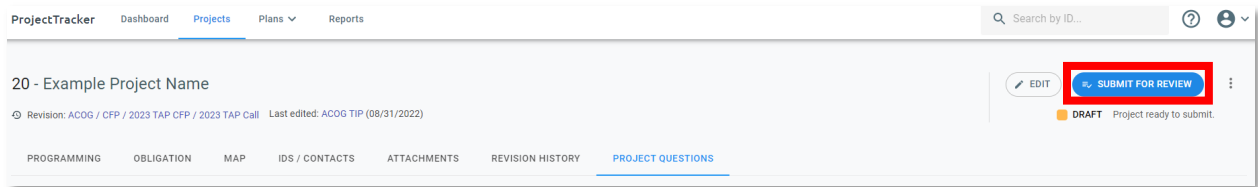


**Figure 60:** Submit for review button

## CONTINUING A SAVED STBG-UZA OR TAP APPLICATION

On the **Dashboard**, select either the Draft option to view all your projects that are in draft status or select the specific grant under the Draft section that your project was created in.



**Figure 61:** Dashboard

Select the project that you wish to edit.



**Figure 62:** View of all the draft projects for your entity

Then select the **EDIT** button on the right side.



**Figure 63:** Project selected to continue editing

# QUESTIONS OR ISSUES

## CONTACTS

At the bottom of the sponsor or CFP homepage are links to contact ACOG and ProjectTracker system administrators.
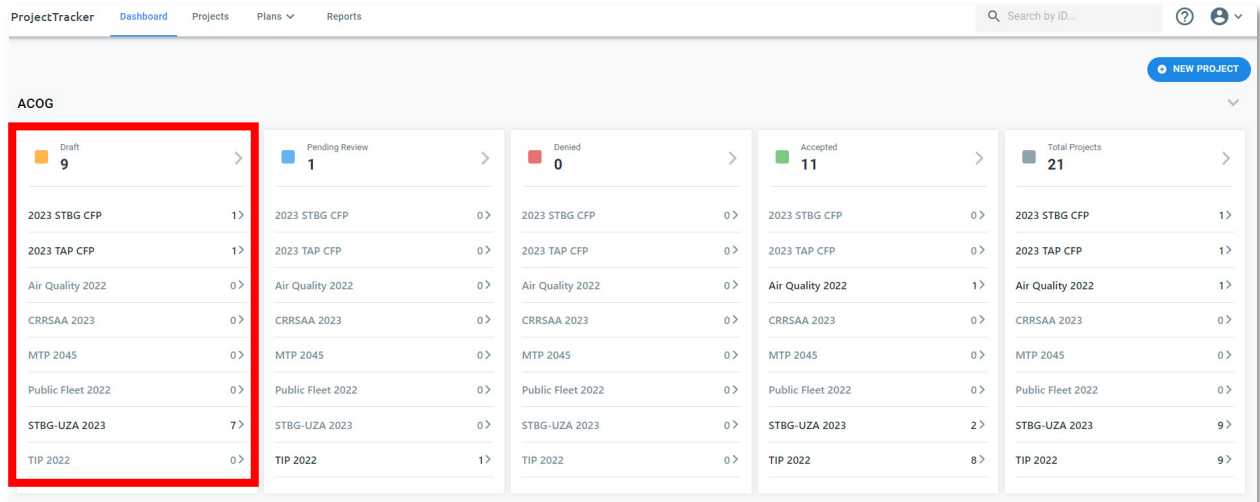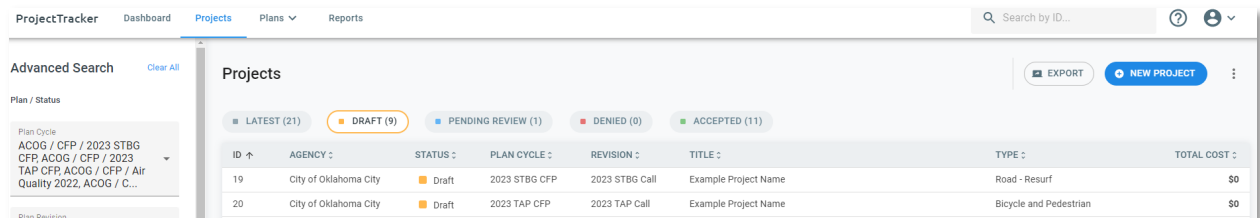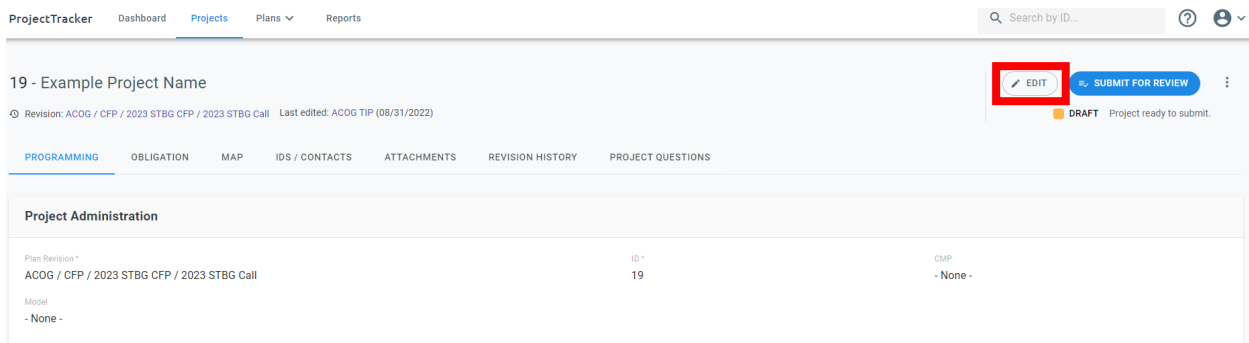
- For questions related to any of the call for projects, contact ACOG at tpsgrants@acogok.org.

- For STBG-UZA project specific or procedural questions, contact ACOG at tpsgrants@acogok.org or (405)234-2264, or visit the STBG-UZA Project Scoring Criteria Dashboard.

- For questions related to the Transportation Alternatives Program (TAP), contact Jordan Evans at jevans@acogok.org or visit the Transportation Alternatives Program website for grant information.

- For questions related to the Air Quality Small Grant Program, contact ACOG at CMAQ@acogok.org or visit the Air Quality Small Grant Program website for grant information.

- For questions related to the Fleet Conversion Grants Program, contact Eric Pollard at epollard@acogok.org or visit the Fleet Conversion Grants webpage.

- For technical issues, such as broken links and server error messages within the ProjectTracker website, contact ACOGTIPHELP@ecointeractive.com.