ECMS II
Reference Guide for Consultants

September 2007
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### COMMON FUNCTIONS & NAVIGATION

**Typical ECMS Screen Layout**

Elements of a typical ECMS screen are described in the table below. *(See screens on following pages)*

<table>
<thead>
<tr>
<th>Screen Element</th>
<th>Description</th>
</tr>
</thead>
</table>
| **ECMS Banner**                | **Logout Hyperlink**  
Appears in far right corner of ECMS Banner (after you are logged in to ECMS)  
**Current User Hyperlink**  
Current User Name appears in far right corner of ECMS Banner (no longer on left) – used to navigate between functional areas  
**Menu Bar**  
Hyperlinks appear in far left corner of ECMS Banner:  
– Clicking on the **Home** hyperlink from anywhere in ECMS returns you to ECMS Home Page  
– Clicking on the **Site Map** hyperlink displays an index of ECMS pages divided by sections with hyperlinks for quick-jump capability  
– Clicking on the **Help** hyperlink displays a listing of Help topics and sub-topics  
**Home/Site Index/Help Hyperlinks** |                                                                                                                                               |
| **Toolbar**                    | Displays buttons for the most common operations on the current screen                                                                                                                                 |
| **Message Area**              | Displays all informational, warnings and error messages                                                                                                                                               |
| **Screen Title**              | Displays name of current screen                                                                                                                                                                        |
| **Common Headers**            | Provide common information and hyperlinks to other areas of ECMS as follows:  
– *hyperlink to main screen with more information* (just one click away)  
– *quick jump capability* by changing agreement number and clicking the GO button  
**Section Headings** | Screens are divided into sections and sub-sections and contain buttons or hyperlinks to create or edit section data                                                                                                                                 |
| **Required Fields**           | Required fields denoted with a flag icon |
**ECMS Banner**

The ECMS banner always appears at the top of the screen. It contains links to the ECMS Home Page, Site Index and help. It also contains a logout hyperlink which only appears after you have logged into ECMS.

**Menu Bar**

The Menu Bar is displayed near the top of the ECMS Home Page. When you click on one of the menu bar options, a sub-menu is displayed.
**Toolbar**
The toolbar is displayed immediately under the menu bar and displays buttons for the most common functions (for example, the Save and Save & Exit) on the current screen.

**Message Area**
Confirmation and Error Messages will display in the message area at the top of the screen under the Menu Bar. Error messages are displayed with an X next to the message and appear in red and bold type. Confirmation messages are displayed with an informational icon next to the message and appear in black.

**Screen Title**
The screen title appears near the top of the screen and displays the name of the current screen.
Common Headers

Common headers appear near the top of the screen and provide common information and hyperlinks to other areas of ECMS. The Agreement header shown below contains a quick jump field allowing you to jump to another agreement.

Section Headings

ECMS screens are divided into sections and sub-sections containing buttons or hyperlinks to create or edit section data.
**Required Fields**

Required fields are denoted with a flag icon as shown on the screen below.

**Search Screens**

ECMS II utilizes Portal screens to search for information and documents for various ECMS functions. For example, the screen below shows the Planned Projects and Advertisements Portal used to search for Planned Projects and Advertisements via custom searches or express searches.
Common Selection Screens

Common Selection screens throughout ECMS allow you to select entries to be added. The selection screen shown below is used to select an employee from the employee roster to assign to an agreement. Filters are available to search within lists and/or sort lists to quickly locate entries you need.
Logging In
1. Open browser and navigate to ECMS.
2. In lower right corner of the ECMS Home Page, enter your **User ID** and **Password**.
3. Click the **Login** button.
4. Click **OK** on the login message.
5. The ECMS Home Page is redisplayed.

Logging Out
1. In the upper right corner of the ECMS Home Page, click the **Logout** hyperlink.
2. The ECMS Home Page is redisplayed.
CONSULTANT INFORMATION

Search for Consultant Information
1. Begin at the ECMS Home Page.
2. Click Business Partner on the Menu Bar.
3. Select Consultant Information from the drop-down list.
4. The Consultant Information Portal screen is displayed.
5. Click Advanced Search.
6. Enter criteria under the Search Criteria Heading.
7. Click Search on the toolbar.
8. Click the Business Partner name hyperlink.
9. The Consultant Qualification Package is displayed.
10. Click the Back button on the toolbar to return to the search results.

Create Consultant Qualifications Package
1. Begin at the ECMS Home Page.
2. Click Business Partner on the Menu Bar.
3. Select Consultant Information from the drop-down list.
4. The Consultant Information Portal screen is displayed.
5. Navigate to the Support Functions Heading.
6. Click Create Consultant Qualifications Package.
7. The Consultant Qualification Package screen is displayed.
8. Enter required information.
9. Click the Save button on the toolbar.
10. Click the Down Arrow in the GO button on the toolbar.
11. Select Consultant Information Portal.
12. The Consultant Information Portal screen is displayed.
View/Edit/Submit Consultant Qualifications Package

1. Begin at the ECMS Home Page.
2. Click Business Partner on the Menu Bar.
3. Select Consultant Information from the drop-down list.
4. The Consultant Information Portal screen is displayed.
5. Navigate to Express Searches Heading.
6. Click Consultant Qualifications Packages.
7. The Consultant Qualifications Packages screen is displayed.
8. Click the Draft status hyperlink.
9. The Consultant Qualification Package screen is displayed.
10. To edit, make changes as necessary and click Save on the toolbar.
11. To delete the Consultant Qualification Package before submission, click the Delete button on the toolbar.
12. To submit the Consultant Qualifications Package, click the Down Arrow in the Workflow button on the toolbar and select Submit.

13. Note: If Right-of-Way Acquisition Services was selected in the Services Provided section, a warning is displayed that your firm MUST be currently approved under the Right-of-Way Acquisition ITQ Contract. Click OK to confirm.

14. Click the Down Arrow in the GO button on the toolbar.
15. Select Consultant Information Portal.
16. The Consultant Information Portal screen is displayed.

Create Employee & Employee Rate

1. Begin at the ECMS Home Page.
2. Click Business Partner on the Menu Bar.
3. Select Consultant Information from the drop-down list.
4. The Consultant Information Portal screen is displayed.
5. Navigate to the Support Functions Heading.
6. Click Create Employee.
7. The Employee screen is displayed.
8. Enter required information.
9. Click the Save button on the toolbar.
10. Navigate to the Classification and Rates Heading.
11. Click New in the heading.
12. Enter required information.
13. To assign an employee/rate to a specific agreement, click the icon next to Rate Scope. The Employee Selection – Employee Roster – Agreements screen is displayed. Click on the Selection Icon next to an agreement number. The Employee Rate screen is displayed with the agreement number selected.
14. Click the Save button on the toolbar.
15. Click the Down Arrow in the Back button on the toolbar.
17. The Consultant Information Portal screen is displayed.

View/Edit/Submit Employee(s) and Employee Rate(s)
1. Begin at the ECMS Home Page.
2. Click Business Partner on the Menu Bar.
3. Select Consultant Information from the drop-down list.
4. The Consultant Information Portal screen is displayed.
5. Navigate to the Express Searches Heading.
6. Click Employee Roster.
7. The Employee Roster screen is displayed.
8. Click an Employee Name hyperlink.
9. The Employee screen is displayed.
10. Make changes to employee name/number if necessary and click Save on the toolbar.
11. Click the Rate hyperlink under the Rate column. The Employee Rate screen is displayed.
12. Edit the rate information as necessary and click the Save on the toolbar.
13. Click on the Down Arrow in the Workflow button on the toolbar and select Submit.
14. Click the Down Arrow in the Back button on the toolbar and select Employee Roster to return to that screen.

Request a Rate Adjustment
1. Begin at the ECMS Home Page.
2. Click Business Partner on the Menu Bar.
3. Select Consultant Information from the drop-down list.
4. The Consultant Information Portal screen is displayed.
5. Navigate to the Express Searches Heading.
6. Click Employee Roster.
7. The Employee Roster screen is displayed.
8. Click on the employee rate hyperlink.
9. The Employee Rate screen is displayed.
10. Navigate to the Request Rate Adjustment Heading.
11. Enter the required information.
12. If necessary to add comments, navigate to the Workflow Heading and add comments in the comment text box.
13. Click the Down Arrow in the Workflow button on the toolbar.
14. Select Submit Adjustment.
15. Click OK on the confirmation message.
16. Click on the Down Arrow in the Back button on the toolbar.
17. Select Employee Roster to return to that screen.
Request to Terminate Employee
1. Begin at the ECMS Home Page.
2. Click Business Partner on the Menu Bar.
3. Select Consultant Information from the drop-down list.
4. The Consultant Information Portal screen is displayed.
5. Navigate to the Express Searches Heading.
6. Click Employee Roster.
7. The Employee Roster screen is displayed.
8. Click on the employee rate hyperlink.
9. The Employee Rate screen is displayed.
10. Navigate to the Employee Rate Information Heading.
11. Enter the effective end date (Note: The Requested Effective End Date must be prior to or equal to the current date.)
12. Click the Terminate button next to Effective End Date.
13. Click OK on the confirmation message.
14. Click the Down Arrow in the Back button on the toolbar.
15. Select Employee Roster to return to that screen.

Create Overhead Rate
1. Begin at the ECMS Home Page.
2. Click Business Partner on the Menu Bar.
3. Select Consultant Information from the drop-down list.
4. The Consultant Information Portal screen is displayed.
5. Navigate to the Support Functions Heading.
6. Click Create Overhead Rate.
7. The Overhead Rate screen is displayed.
8. Enter required information.
9. Click the Save button on the toolbar.
10. Click the Down Arrow in the Back button on the toolbar.
11. Select Consultant Information Portal to return to that screen.

View, Edit & Submit Overhead Rate
1. Begin at the ECMS Home Page.
2. Click Business Partner on the Menu Bar.
3. Select Consultant Information from the drop-down list.
4. The Consultant Information Portal screen is displayed.
5. Navigate to the Express Searches Heading.
6. Click Overhead Rates.
7. The Overhead Rates screen is displayed.
8. Click the Draft hyperlink in the Status column.
9. Edit information as necessary and click Save on the toolbar.
10. If necessary, navigate to the Workflow Heading and add comments in the comment text box.
11. Click the Down Arrow in the Workflow button on the toolbar and select Submit.
12. Click OK on the confirmation message.
13. The Overhead Rate screen is displayed.
14. Click on the Down Arrow in the GO button on the toolbar.
15. Select Consultant Information Portal to return to that screen.

**AGREEMENTS**

**Search for Agreements**
1. Login to ECMS.
2. Click Engineering Agreements in the Menu Bar.
3. Select Agreements.
4. The Agreements Portal screen is displayed.
5. Navigate to Agreement Search Heading.
6. Click Advanced Search.
7. Enter criteria under the Search Criteria Heading.
8. Select at least one additional criterion under the Agreement Team Information Heading.
9. Click Search on the toolbar.
10. The Agreement Search Results screen is displayed.
11. To search again, click Refine Search on the toolbar.
12. Click Clear on the toolbar if necessary to enter new criteria.
13. Click Search on the toolbar again.
14. The Agreement Search Results screen is redisplayed.
15. Repeat the above steps to search again.
16. To view an agreement, click the Agreement number hyperlink.

**Save an Agreement Search**
1. Begin at the Agreements Portal screen.
2. Navigate to Agreement Search Heading.
3. Click Advanced Search.
4. Enter search criteria under the Search Criteria Heading.
5. Select at least one additional criterion under the Agreement Team Information Heading.
6. Enter a name for the search in the Save Search as: field.
7. Click Save on the toolbar.
8. Click Search on the toolbar.
9. The Agreement Search Results screen is displayed.
Execute a Saved Agreement Search
1. Begin at the Agreements Portal screen.
2. Navigate to the Agreements Search Heading.
3. Click the Down Arrow in the drop-down list next to Search.
4. Select a Saved Search and click Execute.
5. The Agreement Search Results screen is displayed.

Search for Part/Work Order
1. Begin at the ECMS Home Page.
2. Click Engineering Agreements in the Menu Bar.
3. Select Agreements.
4. The Agreements Portal screen is displayed.
5. Navigate to the Part/Work Order Heading.
6. Click Advanced Search.
7. Enter search criteria being sure to select an option under the Business Partner Information Heading.
8. Click Search on the toolbar.
9. If necessary, click Refine Search on the toolbar.
10. If necessary, click Clear on the toolbar to enter new criteria.
11. Click Search on the toolbar to search again.
12. The Part/Work Order Search Results screen is redisplayed.
13. Click the Part/WO hyperlink.
14. The Part or Work Order Information screen is displayed.

PLANNED PROJECTS

View Planned Projects
1. Begin at the ECMS Home Page.
2. Click Solicitation on the Menu Bar.
3. Select Consultants and then Planned Projects from the drop-down list.
4. The Planned Projects and Advertisements Portal screen is displayed.
5. Navigate to the Planned Project Custom Search heading.
6. Click Advanced Search hyperlink.
7. Enter search criteria and click Search on the toolbar.
8. Alternately, navigate to the Planned Projects Express Searches Heading.
9. Click the Planned Projects Published (Last Month) hyperlink.
10. The Planned Projects Search Results screen is displayed.
11. Click on an Agreement Number hyperlink to view the Planned Project.
12. The Planned Project screen for that agreement is displayed.
ADVERTISEMENTS

View Advertisements
1. Begin at the ECMS Home Page.
2. Click **Solicitation** on the Menu Bar.
3. Select **Consultants** and then **Advertisements** from the drop-down list.
4. The Planned Projects and Advertisements Portal screen is displayed.
5. Navigate to the Advertisements Custom Search Heading.
6. Click **Advanced Search** hyperlink.
7. Enter search criteria and click **Search** on the toolbar.
8. Alternately, navigate to the Advertisements Express Searches Heading.
9. Click the **Advertisements Published (Last 2 Weeks)** hyperlink.
10. The Advertisements Search Results screen is displayed.
11. Click on the **Published Icon** next to an Agreement Number to view the Advertisement.
12. The Advertisements screen for that agreement is displayed.

Ask Questions from the Advertisement
2. Navigate to the Advertisements Express Searches Heading.
3. Click the **Advertisements Published (Last 2 Weeks)** hyperlink.
4. The Advertisements Search Results screen is displayed.
5. Click on the **Published Icon** next to an Agreement Number.
6. The Advertisement screen for that agreement is displayed.
7. Navigate to the Questions and Responses Heading and click **New**.
8. The Forum – Posting Question screen is displayed.
9. Enter the required information.
10. Click **Submit** on the toolbar.
11. Click **OK** on the confirmation message.
12. The Forum – Posting Question screen is redisplayed.

Use Forum to View Responses to Advertisement Questions
1. Begin at the ECMS Home Page.
2. Click **Solicitation** on the Menu Bar.
3. Select **Forum** from the drop-down list.
4. The Forum Portal screen is displayed.
5. You can use the Advanced Search and enter search criteria, or Express Searches on the Forum Portal as follows:
6. Navigate to the Advertisement Heading.
7. Click **My Recent Questions (1 Month)**.
8. The Forum Search Results screen is displayed.
9. Click on a **Date** hyperlink in the Posted column.
10. The Forum Posting – Question screen is displayed where you can view the response(s).
11. Click the Down Arrow in the **Back** button.
12. Select **Forum Main Page** to return to that screen.
STATEMENTS OF INTEREST (SOIs)

Create Statement of Interest
1. Begin at the ECMS Home Page.
2. Search for the advertisement.
3. The Advertisements Search Results screen is displayed.
4. Click on the Published Icon next to an Agreement Number.
5. The Advertisement screen for that agreement is displayed.
6. Navigate to the Consultant Submission Heading.
7. Click Create next to Statement of Interest.
8. The Statement of Interest screen is displayed.
9. Navigate to the Prime Consultant Information Heading.
10. Click Browse to locate and attach each of the required documents.
11. Click the Save button on the toolbar.
12. Click the Back button on the toolbar.
13. The Advertisement screen is displayed and the status of the SOI is changed to Draft.

View/Edit/Submit Statement of Interest
1. Begin at the ECMS Home Page.
2. Search for the advertisement.
3. The Advertisements Search Results screen is displayed.
4. Click on the Published Icon next to an Agreement Number.
5. The Advertisement screen for that agreement is displayed.
6. Navigate to the Consultant Submission Heading.
7. Click Draft next to Statement of Interest.
8. The Statement of Interest screen is displayed.
9. Make any changes as necessary being sure to click Save on the toolbar.
10. Click the Down Arrow in the Workflow button on the toolbar.
11. Select Submit from the drop-down list.
12. Click OK on the confirmation message.
13. The Advertisement screen is redisplayed and the status of the SOI is changed to Submitted.
SELECTION RESULTS

View Shortlist
1. Begin at the ECMS Home Page.
2. Click Solicitation on the Menu Bar.
3. Select Consultants, then Selection Results from the drop-down list.
4. The Selection Results Portal screen is displayed.
5. Navigate to the Shortlist Express Searches Heading.
6. Click Recent Results (Last 4 Weeks).
7. The Shortlist Results screen is displayed.
8. Click the Business Partner hyperlink to view the Shortlist document.

View Final Ranking
1. Begin at the Selection Results Portal screen.
2. Navigate to the Final Ranking Express Searches Heading.
3. Click Recent Results (Last 4 Weeks).
4. The Final Ranking Results screen is displayed.
5. Click an Agreement Number hyperlink under the Agreement column.
6. Click the Business Partner hyperlink to view the Final Rank document.
TECHNICAL PROPOSAL

Create Technical Proposal

Note: From the Technical Proposal Summary screen, you can view the Scope of Work Report by clicking the down arrow on the GO button in the toolbar.

1. Begin at the Agreement Information screen.
2. Click the Create button next to Technical Proposal.
3. The Technical Proposal Summary screen is displayed.
4. If an Executive Summary is required, navigate to the Executive Summary Heading.
5. Click the Browse button to attach the Executive Summary document.
6. Click Save on the toolbar.
7. Navigate to the Proposal Details Heading.
8. Click on a Part hyperlink under Detail Description.
9. The Technical Proposal Detail screen is displayed.
10. Navigate to the Completion Duration Heading.
11. Enter Completion Period in months in the Completion Period (months) field.
12. Click the Save button on the toolbar.
13. Navigate to the Tasks Heading.
14. Click the Create button under the Approach column.
15. The Technical Proposal Approach screen is displayed.
17. Enter your approach for each task in the text box provided.
18. Click Save & Exit on the Toolbar.
19. The Technical Proposal Detail screen is displayed.
21. Click Edit to attach a document(s) if necessary.
22. Click Save on the Toolbar.
23. Navigate to the Hierarchy Heading and click New to add a subconsultant if necessary and click Save on the toolbar when finished.
24. Click the Down Arrow in the Back button on the toolbar.
25. Select Technical Proposal Summary to return to that screen.

View/Edit/Submit Technical Proposal

1. Begin at the Agreement Information screen.
2. Navigate to the Management Information Heading.
3. Click Draft next to Technical Proposal.
4. Make any changes if necessary, being sure to click Save on the toolbar.
5. Click on the Down Arrow in the Workflow button on the toolbar.
6. Select Submit from the drop-down list.
7. Click OK on the confirmation message.
8. The Technical Proposal Summary screen is displayed and the status is changed to Submitted.
9. Click on the Agreement Number hyperlink in the Header to return to the Agreement Information screen.

Ask Scope Clarification Question
2. Navigate to the Questions and Responses Heading.
3. Click New in the Questions and Responses Heading.
4. The Forum Posting – Question screen is displayed.
5. Enter the subject and your question in the text boxes provided.
6. Click Submit on the toolbar.
7. The Forum Posting – Question screen is redisplayed.
8. Click the Down Arrow in the Back button on the toolbar.
9. Select Technical Proposal Summary to return to that screen.

Use Forum to View Scope Clarification Responses
1. Begin at the ECMS Home Page.
2. Click Solicitation on the Menu Bar.
3. Select Forum from the drop-down list.
4. The Forum Portal screen is displayed.
5. You can use either the Advanced Search and enter search criteria, or Express Searches on the Forum Portal as follows:
6. Navigate to the Scope Clarification Heading.
7. Click My Recent Questions (1 Month).
8. The Forum Search Results screen is displayed.
9. Click on a Date hyperlink in the Posted column.
10. The Forum Posting – Question screen is displayed where you can view the response(s).
11. Click the Down Arrow in the Back button.
12. Select Forum Main Page to return to that screen.

FORUM

Search for Forum Questions & Answers
1. Begin at the ECMS Home Page.
2. Click Solicitation in the Menu Bar.
3. Select Forum from the drop-down list.
4. The Forum Portal screen is displayed.
5. Click Advanced Search under the Custom Searches Heading.
6. Enter the category (i.e., Advertisements or Scope Clarification) and your search criteria under the Search Criteria Heading
7. Click Search on the toolbar.
8. The Forum Search Results screen is displayed.

View Forum Questions & Answers
1. Begin at the ECMS Home Page.
2. Click Solicitation in the Menu Bar.
3. Select Forum from the drop-down list.
4. The Forum Portal screen is displayed.
5. Click Advanced Search under the Custom Searches Heading.
6. Enter the category (i.e., Advertisements or Scope Clarification) and your search criteria under the Search Criteria Heading.
7. Click Search on the toolbar.
8. The Forum Search Results screen is displayed.
9. Click on a Date hyperlink under the Posted column.
10. The Forum Posting – Question screen is displayed.

PRICE PROPOSAL

Create Price Proposal
1. Begin at the Agreement Information screen.
2. Navigate to the Management Information Heading.
3. Click the Create button next to Price Proposal.
4. The Price Proposal Summary screen is displayed.
5. Continue with the following topics to enter price proposal data: Enter Cost Factors, Enter Escalations, Enter Project Team, Enter Labor Tasks and Enter Other Costs.

Enter Cost Factors
2. Navigate to the Price Proposal Details Heading.
3. Click the hyperlink under the Detail Description column.
4. The Price Proposal Details screen is displayed.
5. Navigate to the Cost Factors Heading and Click Edit.
6. The Price Proposal Cost Factors screen is displayed.
7. Enter the cost factor information.
8. Click Save & Exit on the toolbar.
9. The Price Proposal Details screen is displayed.

Enter Escalations
2. Navigate to the Price Proposal Details Heading.
3. Click the hyperlink under the Detail Description column.
4. The Price Proposal Details screen is displayed.
5. Navigate to the Escalations Heading Click **New**.
6. The Price Proposal Escalation screen is displayed.
7. Enter the escalation information.
8. Click **Save & New** to enter additional escalations, or **Save & Exit** on the toolbar to return to the previous screen.
9. The Price Proposal Details screen is displayed.

**Enter Project Team**

2. Navigate to the Price Proposal Details Heading.
3. Click the hyperlink under the Detail Description column.
4. The Price Proposal Details screen is displayed.
5. Navigate to the Project Team Heading and Click **Edit**.
6. The Price Proposal Project Team Detail screen is displayed.
7. Navigate to the Project Team Heading and Click **Edit**.
8. The Price Proposal Project Team Detail screen is displayed.
9. Click in the checkbox(es) next to employee name(s) to select employees.
10. Click **OK** on the toolbar
11. The Price Proposal Project Team Detail screen is displayed.
12. Click **Save & Exit** on the toolbar.
13. The Price Proposal Details screen is displayed.

**Enter Labor Tasks**

2. Navigate to the Price Proposal Details Heading.
3. Click the hyperlink under the Detail Description column.
4. The Price Proposal Details screen is displayed.
5. Navigate to the Labor Tasks Heading.
6. Click on a **Detail Task Number** (i.e., 1.1).
7. The Price Proposal Detail Labor Task Estimation screen is displayed.
8. Enter required information under the Detail Task Name and Task Classifications headings.
9. Click **Save & Exit**.
10. The Price Proposal Details screen is displayed.

**Note:** Even if you are not planning to work on a task, you must go into the task and select Save & Exit. This will save 0 hours for the task. If this is not done for every task you are not working on, it will prevent you from submitting your price proposal.
Enter Other Costs
2. Navigate to the Price Proposal Details Heading.
3. Click the hyperlink under the Detail Description column.
4. The Price Proposal Details screen is displayed.
5. Navigate to the Other Costs Heading and Click New.
6. The Price Proposal Other Costs Detail screen is displayed.
7. Enter required other costs information.
8. Click Save & New on the toolbar to enter additional other costs. When finished click Save & Exit on the toolbar to return to the Price Proposal Details screen.
9. Click the Down Arrow in the Back button on the toolbar.
10. Select Price Proposal Summary from the drop-down list.
11. The Price Proposal Summary screen is displayed.

View/Edit/Submit Price Proposal
1. Begin at the Agreement Information screen.
2. Navigate to the Management Information Heading.
3. Click the Draft hyperlink next to Price Proposal.
4. The Price Proposal Summary screen is displayed.
5. Make changes as necessary, being sure to click Save.
6. When finished, click the Down Arrow in the Workflow button on the toolbar.
7. Select Submit from the drop-down list,
8. The Price Proposal Summary screen is displayed and the Status is changed to Submitted.

LEGAL AGREEMENTS

Search for/Sign Legal Agreements or Legal Work Orders for Consultant Review
1. Begin at the ECMS Home Page.
2. Click My Work Queue icon in the Menu Bar.
3. My Work Queue Portal screen is displayed
4. Navigate to Express Searches Heading.
5. Select Legal Documents.
6. My Work Queue Items screen is displayed.
7. Click on the Legal Agreement hyperlink under the Legal Document column.
8. The Legal Document screen is displayed.
9. Navigate to the Workflow Heading at the bottom of the screen.
10. Enter the required information.
11. Click the Down Arrow in the Workflow button on the toolbar.
12. Select **Approve** from the drop-down list.
13. Click **OK** on the confirmation message.
14. The Legal Document screen is redisplayed and the Document Status is changed to **Deputy Secretary Review**.

**Search for Executed Legal Agreements or Executed Legal Work Orders**

1. Click **Engineering Agreements** in the Menu Bar.
2. Select **Agreements**.
3. The Agreements Portal screen is displayed.
4. Navigate to the Express Searches Heading.
5. Click **Executed Legal Agreements** or **Executed Legal Work Orders**.
6. The Legal Agreements Search Results screen is displayed.
7. To view, click the **Legal Agreement** or **Legal Work Order** hyperlink under the Legal Document column.
8. The Legal Document screen is displayed.
9. Click the Down Arrow in the **Back** button on the toolbar.
10. Select **Legal Agreements Search Results** to view additional legal documents.
11. Alternately, you may click the **Agreement** hyperlink under the Agreement column to go to the Agreement Information screen.

**CONSULTANT EVALUATION**

**View & Acknowledge Consultant Evaluation**

1. Click **Business Partner** in the Menu Bar.
2. Select **Consultant Information**.
3. The Consultant Information Portal screen is displayed.
4. Navigate to the Express Searches Heading.
5. Click **Consultant Evaluations**.
6. The Consultant Evaluations screen is displayed.
7. Click the **Business Partner Name – ID** hyperlink under the Business Partner column.
8. The Consultant Performance Report screen is displayed.
9. Navigate to the Workflow Heading.
10. Enter a comment in the comment text box if necessary.
11. Click the Down Arrow in the **Workflow** button on the toolbar.
12. Select **Acknowledge** from the drop-down list.
13. Click **OK** on the confirmation message.
14. The Consultant Evaluations screen is displayed and the status is changed to **Acknowledged**.
INVOICING

Create Invoice
1. Begin at the ECMS Home Page.
2. Click Engineering Agreements in the Menu Bar.
3. Select Invoices from the drop-down list.
4. The Invoices Portal screen is displayed.
5. Navigate to the Support Functions Heading.
6. Click Create Invoice.
7. The Invoice Creation screen is displayed.
8. Enter the required information.
9. Click Save on the toolbar.
10. The Invoice Summary screen is displayed.

Enter Payroll Information
1. Begin at the Invoice Summary screen.
2. Navigate to the Invoice Totals Heading.
3. Click on Invoice Number hyperlink under the Invoice column.
4. The Invoice Detail screen is displayed.
5. Navigate to the Payroll Heading.
6. Click New in the heading.
7. The Common Selection – Invoicing – Select Employee for Invoice screen is displayed.
8. Select an Employee from roster.
9. Enter payroll information as necessary.
10. Click Save & New on the toolbar to continue entering payroll information.
11. When finished, click Save & Exit on the toolbar.
12. The Invoice Detail screen is displayed.
13. Use the down arrow on the Back button on the toolbar and select Invoice Summary. The Invoice Summary screen is displayed.

Enter Other Costs Information
1. Begin at the Invoice Summary screen.
2. Navigate to the Invoice Totals Heading.
3. Click on Invoice Number hyperlink under the Invoice column.
4. The Invoice Detail screen is displayed.
5. Navigate to Other Costs Heading and click the Edit button.
6. The Other Costs screen is displayed.
7. Enter other costs information.
8. Click Save & New on the toolbar to continue entering other costs information. When finished, click Save & Exit on the toolbar.
9. The Invoice Detail screen is displayed. Use the down arrow on the Back button on the toolbar and select Invoice Summary. The Invoice Summary screen is displayed.
Enter Percent Complete
1. Begin at the Invoice Summary screen.
2. Navigate to the Invoice Totals Heading.
3. Click on Invoice Number hyperlink under the Invoice column.
4. The Invoice Detail screen is displayed.
5. Navigate to the Percent Complete Heading and click the Edit button.
6. The Percent Complete screen is displayed.
7. Enter required information.
8. Click Save & Exit in the toolbar.
9. The Invoice Detail screen is displayed.
10. Use the down arrow on the Back button on the toolbar and select Invoice Summary. The Invoice Summary screen is displayed.

View/Edit and Submit an Invoice
1. Click Engineering Agreements in the Menu Bar.
2. Select Invoices.
3. The Invoices Portal screen is displayed.
4. Navigate to Agreement Search Heading.
5. Click Advanced Search.
6. Enter criteria under the Search Criteria Heading.
7. Click Search on the toolbar.
8. Click on an Invoice Number hyperlink under the Invoice column.
9. The Invoice Summary screen is displayed.
10. Click the Invoice Number hyperlink in the Invoice Totals section to edit invoice data.
11. Make any changes as necessary being sure to click Save on the toolbar.
12. When finished, use the down arrow on the Back button on the toolbar and select Invoice Summary. The Invoice Summary screen is displayed.
13. Click the down arrow in the Workflow button on the toolbar.
14. Select Submit from the drop-down list.
15. The Invoice Summary screen is displayed and the Invoice status is changed to Project Manager Review.
MY WORK QUEUE

View List of Work Queue Items
1. Begin at the ECMS Home Page.
2. Click the My Work Queue icon in the Menu Bar.
3. The My Work Queue Portal screen is displayed.
4. Navigate to the Express Searches Heading.
5. Click on an Express Search hyperlink or the All hyperlink to view all documents requiring action.
6. The My Work Queue Items screen is displayed listing all items by category.

Search My Work Queue
1. Begin at the ECMS Home Page.
2. Click the My Work Queue icon in the Menu Bar.
3. The My Work Queue Portal screen is displayed.
4. Navigate to the Custom Searches Heading.
5. Click Advanced Search.
6. The My Work Queue Search screen is displayed.
7. Navigate to the Search Criteria Heading.
8. Click in the checkbox(es) next to the items you want to exclude from your search.
9. Click Search in the toolbar.
10. The My Work Queue Items screen is displayed.
11. Click on a hyperlink next to the item requiring an action.
12. The appropriate screen is displayed for you to take the required action.

Save a Work Queue Search
1. Begin at the ECMS Home Page.
2. Click My Work Queue icon in the Menu Bar.
3. The My Work Queue Portal screen is displayed.
4. Navigate to the Custom Searches Heading.
5. Click Advanced Search.
6. The My Work Queue Search screen is displayed.
7. Under the Search Criteria Heading, click in the checkbox(es) next to the items you want to exclude from your search.
8. Navigate to the Saved Searches Heading near the bottom of the screen.
9. Enter a name for the search in the Save Search as: field.
10. Click Save on the toolbar.
11. Click Search on the toolbar.
12. The My Work Queue Items screen is displayed.