

## MPO/RPO Grants Teamsite Instructions for RPOs

NCDOT has developed a teamsite site for the management of the MPO/RPO Grant Funding process. This site will house MPO and RPO Grant allocation and work program letters created by NCDOT, as well as draft and final work programs and invoices. Deliverables will be submitted as they are now, through FTS. Use of the system will require the use of an NCID for non-DOT employees. DOT employees will be logged in automatically from the link below using their NCDOT Active ID.

### I. Local RPO Coordinator Instructions - Uploading Documents (All documents except Quarterly Expenditure Table must be in .pdf format. )

To upload a document, the Local Coordinator will need to click on the following *Connect NCDOT* link to login: <https://connect.ncdot.gov/default.aspx>

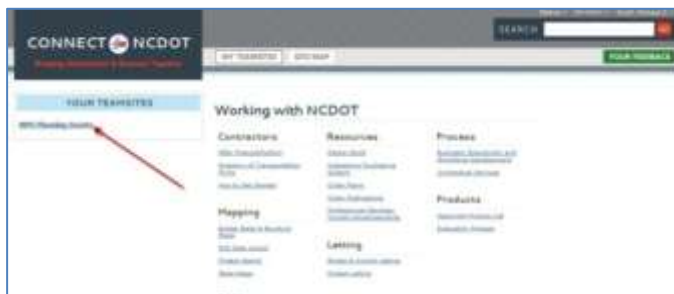
Once there, click the *Sign In* button in the lower left corner to login using a valid NCID. The format of your NCID should be: ncid\username



If you have problems logging in, you should first check to make sure your NCID is valid. After a certain period of time of non-use, they may go dormant. To check whether your NCID is active, go to: <https://ncid.nc.gov/>. If you're still having problems, go through the steps on this page ( <https://connect.ncdot.gov/help/Pages/sign-in-help.aspx>). If this doesn't solve the problem, send an email to [mbruff@ncdot.gov](mailto:mbruff@ncdot.gov).

Once logged in, the Local Coordinator will be directed to a teamsite landing page that will include all their sites. To access the Grants teamsite, click on *MPO and RPO Planning Grants*.

Once on the Grants site, the Local Coordinator will be able to view their own documents, or

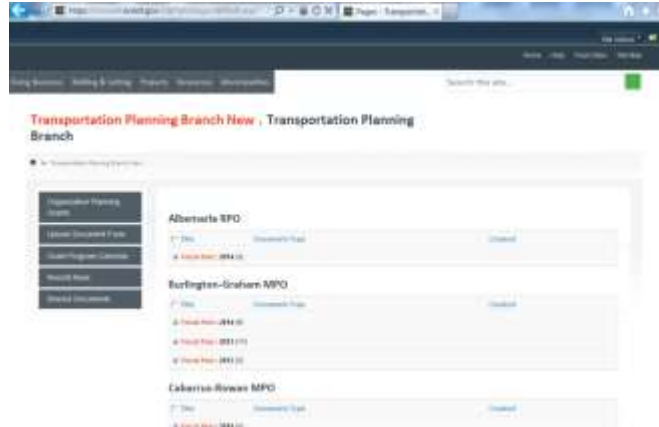


upload one of the following types of documents (**in .pdf format only**): *Draft PWP, Draft PWP Revised, Final PWP, Final PWP Revised, Invoice, Invoice Revised or Year End Report*. To facilitate review by the TPB coordinator, multiple files (except invoices) should be combined into a single .pdf document

and uploaded as one document. For invoices, the *Invoice* and *Invoice Cover Letter* should be uploaded as a single combined .pdf file. The *Quarterly Expenditure Table* should be uploaded as an excel spreadsheet as a separate file using the same form as the Invoice and Invoice Cover Letter. The *Quarterly Expenditure Table* will be downloaded by the TPB Coordinator who will enter their review comments. To upload one of these documents, click on the **Upload**

Document Form in the left hand menu (see next page). Deliverables will be submitted as they are now, through the FTS site. For Work Programs amended during the year, the RPO should choose Final PWP Revised and indicate the revision number in the document submission name (see page 7 for characters that are not allowed in filenames).

The Submission Name is a short description of what you are uploading. It is used in the approval process to identify what has been submitted. The following convention is recommended: RPO FY xx Document Type. For example, the FY 2013 draft work program for the Albemarle RPO may be: Albemarle RPO FY 2013 Draft PWP. The Final invoice might be Albemarle RPO MPO FY 2012 Final PWP. If a revision is needed prior to approval, the name might be Albemarle



RPO FY 2013 Revised PWP. If the RPO approves an amendment during the year, the document name might be Albemarle RPO FY 2012 PWP Amend1. This convention is important so that those receiving emails regarding the document will know what has been uploaded. This **should not** be the submitter's name, or generic text like Invoice 1. An invoice may be: Albemarle RPO FY 2012 Invoice 1Q. Next, select the RPO, Fiscal Year and Document Type from the drop down boxes. Attach the document as a **single document** in .pdf (except as described above

for invoices) and add any notes.

The upload of an invoice or work program document will initiate an approval/review workflow:

- The TPB Coordinator will receive an email (their supervisor will also receive the same approval email) asking them to review and approve the document.
- The TPB Coordinator is responsible for reviewing and approving the invoice. Their supervisor will be responsible for review and approval if the TPB Coordinator is not available. The TPB Coordinator will review the Invoice and Invoice Cover Letter. If the Invoice is correct, the TPB Coordinator will download the Quarterly Expenditure Table, enter comments and post the table, the approval memo, and quarterly deliverables at: S:\Shared\TPB Temporary\RPOs\RPO Invoices\_Deliverables - FY 13-14, and then approve the Invoice using the work flow email, or alternate approval method described in IIb below.
- Once the TPB Coordinator (or Supervisor) approves the invoice, the RPO will receive an email and the document will proceed to the next step. The TPB Coordinator may also reject the invoice because of errors or missing information. Once rejected, the RPO will receive an email letting them know that the invoice has been rejected. The TPB

Coordinator should contact the RPO to let them know why the invoice was rejected and that a revised invoice needs to be submitted. Once the RPO has corrected the invoice, they should upload the revised invoice to the Grants site as a new document (document type: Invoice Revised) using the Upload Document Form link. This will create a new workflow and allow the tracking of documents. The RPO should not go into an existing document and change its file attachments.

- Once it's been approved for payment in SAP, the TPB Invoice Manager will mark the invoice as approved, upload the Invoice Approval Letter and completed Quarterly Expenditure Table and the RPO will receive an approval email.

The upload of a Draft or Final Work Program will initiate an approval/review workflow:

- The TPB Coordinator will receive an email (their supervisor will also receive the same approval email) asking them to review and approve the document.
- The TPB Coordinator is responsible for approving the draft and final work program. Their supervisor will be responsible for review and approval if the TPB Coordinator is not available. The TPB Coordinator may also reject the draft, final or revised Work Program because of errors or missing information. Once rejected, the RPO will receive an email letting them know that the work program has been rejected. The TPB Coordinator should contact the RPO to let them know why the Work Program was rejected and that a revised Work Program needs to be submitted. Once the RPO has corrected the Work Program, they should upload the revised Work Program to the Grants site as a new

document using the Upload Document Form link. This will create a new workflow and allow the tracking of documents. The RPO should not go into an existing document and change its file attachment.

- Once the Work Program is approved, it will be forwarded to the RPO Program Manager for final review and approval. It will be combined with the other work programs into the Statewide SPR RPO Work Program that will be submitted to FHWA for approval. At the same time, the Program Manager will set up funding for the Statewide SPR RPO Work Program, and enter each RPOs work program in NCDOT's SAP system.

- Once the Work Program is approved in SAP, the Work Program will be approved on the teamsite, and the RPO will receive an email letting them know that it has been approved.

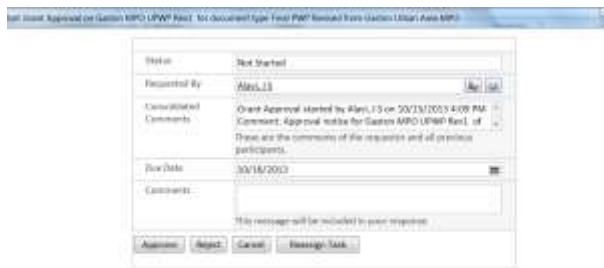
- The Program Manager will upload the Approval Letter for each RPO, and the RPO will receive an email letting them know that their approval letter has been uploaded and is available for review. At any time, the RPO may go to the Grants teamsite to see a status of any document submitted.

### Setting Alerts

*In addition to the workflow and upload notice alerts that are built into the system for the various upload document types, alerts may also be set up for each MPO and RPO page. To set up an alert, go to the site and click on one of the MPO or RPO headers that you have rights for. In the top left hand corner should be a box that reads List Tools with a selection for Items and Lists. Select Items. All choices should be grayed out except Alert Me. Select Manage My Alerts and then Add Alert on the next page. Select the MPO or RPO that you'd like to receive alerts for. Leave the defaults, and click next and then ok.*

## II. TPB RPO Coordinator Instructions – Reviewing and Approving Documents

- a. Primary Approval Process - The TPB Coordinator is responsible for reviewing and approving the RPOs invoice and work programs. The TPB Coordinator may also view other documents by logging into the teamsite by clicking on the following link: <https://connect.ncdot.gov/site/tpb/pages/default.aspx>. If using Internet Explorer, NCDOT employees will be automatically logged in to the teamsite when they click the sign in button.



When the RPO submits an invoice, or Draft or Final Work Program, the TPB Coordinator will receive an email letting them know that a new document has been submitted and is waiting for their approval (see left). To process the document, the TPB Coordinator will click on the [Review](#) link at the bottom of the email. This will open a new page where the submitted document can be viewed. To approve or reject, the TPB Coordinator will need to click on the [Open this task](#) link at the top of the email. (The employee's supervisor will receive the same email, but will not approve it unless the TPB Coordinator is not available.) This will open the task on the teamsite for the TPB Coordinator to make comments and approve or reject the document by clicking on the buttons at the bottom of the form (left). If the document is a Work Program, no additional action is required. If the Invoice is correct, the TPB Coordinator will download the

*Quarterly Expenditure Table*, enter comments and post the table, the approval memo, and quarterly deliverables at: S:\Shared\TPB Temporary\RPOs\RPO Invoices\_Deliverables - FY 13-14, and then approve the Invoice using the work flow email or alternate approval method described in Section IIb below. The TPB Coordinator will need to write an approval memo as per the current procedure, and provide a paper copy (the same day as the online approval) to the RPO Invoice Manager (currently Elina Zlotchenko) to process. The TPB Coordinator must process the invoice within two weeks.

b. Alternate Approval Process - An alternate way of approving an invoice or work program after the document has been reviewed is to click

on the header for the RPO that you have the approval rights for. The screenshot to the left shows the view that is available after you log in. Clicking on section "Winston-Salem Urban Area MPO" will bring up the screen below. To approve an item, click on the "In Progress" link (below) in the Winston-Salem MPO Approval Column.

Title	Document Type	Approval Column	Status
Winston-Salem MPO 2014 (2)			
Winston-Salem MPO 2014 (1)			
Winston-Salem MPO 2014 (2)			
Winston-Salem MPO 2014 (3)			
Winston-Salem MPO 2014 (4)			
Winston-Salem MPO 2014 (5)			
Winston-Salem MPO 2014 (6)			
Winston-Salem MPO 2014 (7)			
Winston-Salem MPO 2014 (8)			
Winston-Salem MPO 2014 (9)			
Winston-Salem MPO 2014 (10)			
Winston-Salem MPO 2014 (11)			
Winston-Salem MPO 2014 (12)			
Winston-Salem MPO 2014 (13)			
Winston-Salem MPO 2014 (14)			
Winston-Salem MPO 2014 (15)			
Winston-Salem MPO 2014 (16)			
Winston-Salem MPO 2014 (17)			
Winston-Salem MPO 2014 (18)			
Winston-Salem MPO 2014 (19)			
Winston-Salem MPO 2014 (20)			

This will take you to a work flow status screen (below). If you have the approval rights for the item shown, you will be able to click on the link under the "Assigned To" heading (below left) and the approval box will pop up (below right). This will be a similar screen the one that pops up when you click the link from the workflow email. The buttons at the bottom are greyed but will turn blue when you hover over them to select.

Title	Document Type	Status	Winston-Salem MPO Approvals
Winston-Salem MPO 2014 (2)			
Winston-Salem MPO 2014 (1)			
Winston-Salem MPO 2014 (2)			
Winston-Salem MPO 2014 (3)			
Winston-Salem MPO 2014 (4)			
Winston-Salem MPO 2014 (5)			
Winston-Salem MPO 2014 (6)			
Winston-Salem MPO 2014 (7)			
Winston-Salem MPO 2014 (8)			
Winston-Salem MPO 2014 (9)			
Winston-Salem MPO 2014 (10)			
Winston-Salem MPO 2014 (11)			
Winston-Salem MPO 2014 (12)			
Winston-Salem MPO 2014 (13)			
Winston-Salem MPO 2014 (14)			
Winston-Salem MPO 2014 (15)			
Winston-Salem MPO 2014 (16)			
Winston-Salem MPO 2014 (17)			
Winston-Salem MPO 2014 (18)			
Winston-Salem MPO 2014 (19)			
Winston-Salem MPO 2014 (20)			

to

Transportation Planning Branch New - Workflow Status: Winston-Salem MPO Approvals

Assigned To	Title	Case Code	Status	Available Content	Columns
Winston-Salem MPO 2014 (1)	Winston-Salem MPO 2014 (1)				

Transportation Planning Branch New - Tasks: Start Grant Approval on Gaston MPO UPWP Rev1 for document type Final PWP Revised from Gaston Urban Area MPO

Winston-Salem MPO 2014 (1)

Title: Not Started

Reported By: [User]

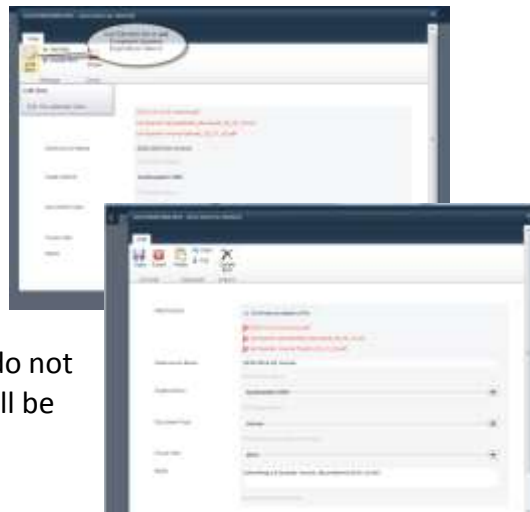
Generated Comments: Grant Approval (Finality) Form - 1 Jan 18 10:13:32 AM PM - Document Approval - initial for upwp-180118PWP Rev1 - 18 Jan Final PWP Revised from Gaston Urban Area MPO

Date Due: 2018/10/13

Buttons: [Cancel] [Back] [Forward] [Approve]

### III. TPB RPO Invoice Manager Responsibilities – Reviewing and Approving Invoices

Once the TPB Coordinator approves the invoice and submits a copy of the Invoice Approval Memo to the TPB Invoice Manager and uploads the completed *Quarterly Expenditure Table* to the S:\ drive), the TPB Invoice Manager will receive an email from the teamsite letting them know that an invoice is available for final approval. The TPB Invoice Manager will log into SAP and create an invoice. They will obtain a copy of the *Invoice* and *Invoice Cover Letter* from the teamsite and a copy of the approval memo and completed *Quarterly Expenditure Table* from Elina Zlotchenko and upload it to the invoice created in SAP. Once the invoice has been approved in SAP, the TPB Invoice Manager will click on the [Open this task.](#) link from the work flow email (or follow the alternate approval method in IIb.) and mark the invoice as approved. The RPO will then receive an email telling them that the invoice has been approved. The TPB Invoice Manager will also upload a copy of the completed *Quarterly Expenditure Table* and to the appropriate Invoice submission entry on the Grants site (do not use Upload Document Form or a new invoice workflow will be created).



### IV. RPO Program Manager Instructions – Reviewing and Approving Work Programs

Once the TPB Coordinator approves the work program by using the [Open this task.](#) link in the workflow email (or follow the alternate approval method in Section IIb), it will be submitted to the RPO Program Manager for review, processing and approval. The work program will be combined with the other RPO work programs into the Statewide SPR RPO Work Program that will be submitted to FHWA for approval. At the same time, the Program Manager will set up funding for the work program, and enter the work programs in SAP. Once approved in SAP, the work program will be approved in the teamsite, and the RPO will receive an email letting them know that it has been approved. The Program Manager will also upload the Work Program Approval memo which will send an email to the RPO letting them know that their work plan has been approved and the Approval Letter is available for downloading.

### V. Uploading Other Documents

Invoices and work programs are the only documents that will initiate an approval/review work flow. Allocation Letters and Approval Letters (for work programs) entered by the TPB Program Manager will generate an email to the RPO. Year End Reports are entered by the RPO and will generate an email to RPO Program Manager, TPB Invoice Manager and the TPB Coordinator.

### VI. Roles

RPO Program Manager – (Currently Travis Marshall) provides final approval of Work Program once approved by TPB Coordinator; develops Statewide SRP RPO Work Program and submits to FHWA for approval; provides final approval of work programs and develops annual grant allocations; uploads Work Program Approval letters and annual Grant Allocation letters.

TPB Invoice Manager – (Currently Travis Marshall and Elina Zlotchenko), reviews invoices submitted, reviews invoice approval memo by TPB Coordinator, provides final approval of invoices once uploaded by the Local RPO Coordinator, approved by TPB Coordinator and approved for payment in SAP.

TPB Coordinator – (TPB RPO Coordinator), each TPB coordinator will only see their areas' documents. The TPB Coordinator has the rights to upload any of the document types for the RPO. The group supervisors will be able to see the documents for all the RPOs in their area. The TPB Coordinator is responsible for reviewing and approving invoices and work plans submitted by their areas. The coordinator's supervisor and Unit Head are responsible for the review and approval if the coordinator is not available.

Local Coordinator – (may have primary and secondary contact for the RPO), each Local Coordinator will only see their areas' documents. The RPO will be able to upload draft, final and revised work programs and invoices and will receive emails when an Allocation or Approval Letter is uploaded by NCDOT or when an invoice or work program has gone through one of its approval steps.

Unallowable Filename Characters –

- Number sign
- Tilde
- Percent
- Ampersand
- Asterisk
- Braces
- Backslash
- Colon
- Angle brackets
- Question mark
- Slash
- Pipe
- Quotation mark