## Document Revisions

<table>
<thead>
<tr>
<th>Date</th>
<th>Version Number</th>
<th>Document Changes</th>
</tr>
</thead>
<tbody>
<tr>
<td>10/30/2015</td>
<td>2.0</td>
<td>Initial Draft</td>
</tr>
<tr>
<td>11/6/2015</td>
<td>2.0</td>
<td>After edits, initial deployment, Version is to match the PMTS Versioning number.</td>
</tr>
</tbody>
</table>
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1 Introduction

1.1 Scope and Purpose

The Project Management and Tracking System (PMTS) is a relational database system used to manage and track Louisiana Transportation Research Center (LTRC) research and technical assistance projects through the project cycle. All project information is entered and retrieved from the database through a website using individual user logins. In addition to storing project information digitally, the system offers reports and business data analysis enabling LTRC project management and associated business processes to be more efficient.

For more information on LTRC research process and project management, please see the LTRC Research Manual.

This User's Guide is designed to inform users about the pages and functionalities of the system. Each capability link will be covered as well as any guidance on how and who should use the functionality.

1.2 Permission Based Login Overview

PMTS utilizes a permission based matrix to allow access to certain webpages and to enable or disable controls located on pages (such as areas users enter information, buttons or links). Each user is assigned at least one role. Users can have a number of roles within PMTS.

PMTS requires a login only if you have an active project role with LTRC. A user could be a Principal Investigator of a project funded by LTRC, a review committee member for a project, or a committee member for the biennial research project consideration process. Each user is assigned at least one role in the system when their login is created. The most common roles are Principal Investigator, Project Manager, Group Administrator, Editor and Administrative.

A Principal Investigator (PI) is the head of an LTRC research project. This user submits biannual reports, annual work program documents and publications through PMTS for review by a Project Manager. This user does NOT have access to all project tabs listed at the top of PMTS pages. A PI usually contacts the PM on their project should any other project information need to be modified or added.

A Project Manager (PM) utilizes PMTS to review all the reports and documents submitted by the PIs for the projects under their umbrella of responsibility. PMs have an increased ability to modify some project information but would contact the Group Administrator or the DOTD Section 19 Administrative office should any other project information need to be modified or added.

A Group Administrator (GA) conducts another layer of project management that is responsible for all project conducted under one or more research program study areas. These users review the reports and budgetary documents for each project after PM review. These users also have elevated privilege to modify some project information but would
contact the DOTD Section 19 Administrative office should any other project information need to be modified or added.

Editor is a special user that is the non-technical review for any publications submitted through PMTS.

Administrative permissions are for those DOTD Section 19 and LTRC Director’s Office personnel who have the responsibility to maintain all research project administrative functions. These users have access to ALL pages and functionalities in PMTS. These personnel assign LTRC project numbers, budgetary numbers and create all user logins.

1.3 PMTS Layout

PMTS is organized by tabs, grouping for related functions at the top of each webpage. Each tab has webpage navigation links to the left side of the page (if applicable). Not all users have access to each tab or access to all links even if they can access the tab's main page.
2 Login Page

This webpage is the default location when one browses to PMTS at http://projectmanagement.ltrc.lsu.edu/

2.1 Login Area

The blue background area of this page is where a user enters their login and password information that was emailed when the login account was created for the user.

2.1.1 Login to PMTS

1. Enter the **User Email**.
2. Enter a **Password**.
3. Click on the **Login** button.
NOTE: If the credentials are verified, the user will be sent to the myLTRC page or the Home menu based on their role.

If the credentials are not verified, the user will receive a red colored text warning about the error or may see a SQL non-authenticated error from the SQL Server database.

2.1.2 Forgot Password
4. If the user has forgotten a password, click on the Forgot password link.
   a. Enter the Login ID.
   b. Click the Submit button.
   c. The user will receive an email from the system with login credentials.
2.1.3 Request a Login Account

1. Click the Create a new account (gray background button).
2. Fill out the requested information on the Request an Account page.
3. Click the Request User Login button.
   If any information is not included or in the incorrect format, the system will return an informative red textual message for what needs to be included or corrected.
   The user will be redirected to a confirmation page.
   The user will receive an email from the LTRC Administrative staff when a login has been created.
2.2 Informational Area

This area communicates the general information for PMTS. It has links to the LTRC website and the LTRC Research Manual. It also contains information about system changes in the yellow highlighted area.
2.3 Submit a Problem Statement

This area contains information about problem statements and the link to submit them.

This link and associated text panel ONLY appears between configurations dates in the web.config file.

Generally, Oct 1 in even number years until January 31 in odd numbered years.

1. Click on the Submit a Problem Statement (no login required) link.

2. Fill in the information requested on the Submit Problem Statement Page.
3. Click on the Submit button.
a. If any information is not included or in the incorrect format, the system will return an informative red textual message for what needs to be included or corrected.

b. The user will be taken to a confirmation page.

c. PMTS will email the appropriate LTRC personnel to inform them of the submission.

d. The user will also receive an email from PMTS indicating that the submission of the problem statement.
This page contains the functionality to change a password.

A user can navigate to this page at any time by clicking on the Home tab at the top of most PMTS webpages.

The user is automatically sent here upon login if no active LTRC projects have them as PI, PM or GA.
3.1 Change Password

1. Fill out all requested information on the Change Password webpage.

   ![Change Password webpage](image)

   **User Information**
   - User Name: test PI
   - User Email: test PI@lta.gov
   - User Agency: LTRC
   - Phone: 555-555-5555

   **Modify Password**
   - Old Password:
   - New Password:
   - Confirm New Password:

   [Submit] [Clear All]

2. Click the Submit button.
3. If the save to the database was successful, the user will be redirected to this confirmation page.
4 myLTRC

ACCESS NOTE: All users have access to this tab and all links on the page.

This page contains a list of projects specific to the user that is logged into PMTS. The list is sorted by ascending order of End Date for the project. All projects where there is no end date will be at the top of the list.

The user can navigate to this page at any time by clicking on the myLTRC tab at the top of most PMTS webpages.

The user is automatically sent here upon login if they are PI, PM or GA on any current LTRC projects.

The user will see a list of all active projects with which they are affiliated. An active project is a project in the Proposed, Ongoing, Publication Pending or Publication Past Due Status where you are a PI, PM or GA on the project.

NOTE: There may be multiple pages on the list. Navigate all the projects by clicking on the blue number at the bottom of the list.
4.1 Go to Project Summary page for a project

1. Click on the LTRC project number link.

   NOTE: For those projects in Proposed status that have not been assigned an LTRC project number yet by the LTRC Associate Director of Research, the the word unassigned is the link.

2. The user will be directed to the Project Summary page for that project.
Project Summary Page for 14-5SS

LTRC Project Management and Tracking System Upgrade

Go Back to myLTRC page

Project Details

<table>
<thead>
<tr>
<th>Role</th>
<th>Title</th>
<th>Status</th>
<th>PI</th>
<th>Proposed Start</th>
<th>Actual Start</th>
<th>Proposed End</th>
<th>Revised End</th>
<th>View</th>
</tr>
</thead>
<tbody>
<tr>
<td>PI</td>
<td>LTRC Project Management and Tracking System Upgrade</td>
<td>Ongoing</td>
<td>Zhongjie Zhang</td>
<td>7 01 2014</td>
<td>11 01 2014</td>
<td>7 31 2016</td>
<td></td>
<td>View</td>
</tr>
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</table>

Budget Details

Original Budgets: $125,266.00

No Project Budget revision on record

<table>
<thead>
<tr>
<th>SIC</th>
<th>FISCAL YEAR</th>
<th>BUDGET GROUP</th>
<th>COST ELEMENT NAME</th>
<th>COST</th>
<th>as of 06/30/2015</th>
</tr>
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<tbody>
<tr>
<td>14-5SS/DOTLT1000018</td>
<td>Total</td>
<td></td>
<td></td>
<td>$41,877.18</td>
<td></td>
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<tr>
<td>Total</td>
<td></td>
<td></td>
<td></td>
<td>$41,877.18</td>
<td></td>
</tr>
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</table>

Biannual Details

<table>
<thead>
<tr>
<th>Biannual Period</th>
<th>FY</th>
<th>FY Cost (Original)</th>
<th>FY Cost (Revised)</th>
<th>FY Expenditure to Date</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>December</td>
<td>2014-2015</td>
<td>$80,474.00</td>
<td></td>
<td>$11,211.00</td>
<td>View</td>
</tr>
<tr>
<td>June</td>
<td>2014-2015</td>
<td>$80,474.00</td>
<td></td>
<td>$37,777.00</td>
<td>View</td>
</tr>
<tr>
<td>December</td>
<td>2015-2016</td>
<td></td>
<td></td>
<td></td>
<td>Create</td>
</tr>
</tbody>
</table>
4.2 Project Summary Page for a Project

Select a link from this page based on what the user wants to accomplish. It will redirect the user to the correct page of PMTS that contains this function with this particular project selected. In other words the links on this page are just pointers to other webpages within PMTS.

The links to the left are to go to locations within this page because the page contains a large amount of categorized lists.

1. Go back to myLTRC page links at top and bottom of the webpage will redirect the user to the previous page.

2. Project Details
   The View link will take the user to the Project Details.
3. Budget Details

### Budget Details

<table>
<thead>
<tr>
<th>SIO</th>
<th>Fiscal Year</th>
<th>Budget Group</th>
<th>Cost Element Name</th>
<th>Cost as of 06/30/2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>614-55-SSS/DOHIT1000018</td>
<td>Total</td>
<td></td>
<td></td>
<td>$41,877.18</td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td></td>
<td></td>
<td>$41,877.18</td>
</tr>
</tbody>
</table>

The + sign will expand out the budget information for this project.

4. Biannual Details

a. A **View** button indicates that a Biannual report has been submitted for a previous Biannual period. 
   Clicking on the View link will redirect the user to that project’s Biannual Report Details for the Biannual period listed to the left in the table.

b. An **Edit** link indicates that a Biannual report has been submitted for this Biannual period. 
   Clicking on the Edit link will redirect the user to that Biannual Report in Edit mode for the Biannual period listed to the left in the table.

c. A **Create** link indicates that a Biannual report has NOT been submitted for this Biannual period. 
   Clicking on the Create link will redirect the user to the Create Biannual webpage with this project selected and the period will be the current Biannual period.

### Biannual Details

<table>
<thead>
<tr>
<th>Biannual Period</th>
<th>FY</th>
<th>FY Cost (Original)</th>
<th>FY Cost (Revised)</th>
<th>FY Expenditure To Date</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>December</td>
<td>2014-2015</td>
<td>$80,474.00</td>
<td>$17,211.00</td>
<td>$17,211.00</td>
<td>View</td>
</tr>
<tr>
<td>June</td>
<td>2014-2015</td>
<td>$30,474.00</td>
<td>$31,777.00</td>
<td>$31,777.00</td>
<td>View</td>
</tr>
<tr>
<td>December</td>
<td>2015-2016</td>
<td>$55,047.00</td>
<td></td>
<td></td>
<td>Edit</td>
</tr>
</tbody>
</table>
5. Annual Work Program Details
   a. A View link indicates that an Annual Work Program report has been submitted for the listed fiscal year. Clicking on the View link will redirect the user to that project’s Annual Work Program Report for the fiscal year listed to the left in the table.
   b. An Edit link indicates that an Annual Work Program report has been submitted for the immediately previous fiscal year. Clicking on the Edit link will redirect the user to that Annual Work Program report in Edit mode for the previous fiscal year to the left in the table.
   c. A Create link indicates that an Annual Work Program report has NOT been submitted for the next fiscal year. Clicking on the Create link will redirect the user to the Create AWP webpage with this project selected.

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Project Cost (Original)</th>
<th>Project Cost (Revised)</th>
<th>FY Cost (Original)</th>
<th>FY Cost (Revised)</th>
<th>FY Expenditure to Date</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013-2014</td>
<td>$125,000.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>View</td>
</tr>
<tr>
<td>2014-2015</td>
<td>$125,266.00</td>
<td>$80,474.00</td>
<td></td>
<td></td>
<td>$24,136.00</td>
<td>View, Edit</td>
</tr>
</tbody>
</table>

6. Research Assessment and Implementation Report Details
   a. An Edit link indicates that a Research Assessment Report has been submitted for the project and the user is the PI on the project. Clicking on the Edit link will redirect the user to that project’s Research Assessment report in Edit mode.
   b. A View link indicates that a Research Assessment Report has been submitted for the project and that the user is not the PI on the project. Clicking on the View link will redirect the user to that project’s Research Assessment report.
   c. A Create link indicates that a Research Assessment report has NOT been submitted for the project. Clicking on the Create link will redirect the user to the Create Assessment Report webpage with this project selected.
7. Project Tasks
Details about all the project tasks entered into PMTS. The completion percentages are taken from the most recent Biannual Report.
This section is for informational purposes only. There is no link to editing project tasks because that requires the Administrative permission role.

<table>
<thead>
<tr>
<th>Task Number</th>
<th>Task Title</th>
<th>% Completed</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>PMTS Version 1 Initial System Evaluation</td>
<td>100</td>
</tr>
<tr>
<td>2</td>
<td>PMTS Version 1 Debugging and Thorough System Evaluation</td>
<td>100</td>
</tr>
<tr>
<td>3</td>
<td>PMTS Version 1 Immediate Corrections</td>
<td>100</td>
</tr>
<tr>
<td>4</td>
<td>Conduct Informational Meetings for PMTS Version 2</td>
<td>100</td>
</tr>
<tr>
<td>5</td>
<td>Develop Interim Report</td>
<td>100</td>
</tr>
<tr>
<td>6</td>
<td>Develop PMTS Version 2</td>
<td>75</td>
</tr>
<tr>
<td>7</td>
<td>LTTRC User Acceptance Testing</td>
<td>25</td>
</tr>
<tr>
<td>8</td>
<td>Deploy PMTS Version 2</td>
<td>10</td>
</tr>
<tr>
<td>9</td>
<td>Develop Training Materials and Documentation</td>
<td>5</td>
</tr>
<tr>
<td>10</td>
<td>Final Report</td>
<td>0</td>
</tr>
</tbody>
</table>

8. PRC Details
This list contains information about the members of the Project Review Committee. This section is for informational purposes only. There is no link to editing PRC members because that requires the Administrative permission role.

<table>
<thead>
<tr>
<th>Member Name</th>
<th>Member Status</th>
<th>Affiliation</th>
<th>Email</th>
<th>Phone Number</th>
</tr>
</thead>
</table>

9. High Value Research Designation
If the project was submitted as a High Value Research project to AAHSTO then the date and any comments will be indicated here.

Submitted as High Value Research
11/24/2015 Date Submitted to AASHTO
10. Publications
For each publication type listed, there is either a Submit or View link as well as textual status information if the View link is shown.

a. A **View** link indicates that a publication of that type has been submitted. If the View link is shown, then an area with the publication status comments is also shown. Clicking on the View link will redirect the user to the Track page for that publication.

b. A **Submit** link indicates that a publication of that type has NOT been submitted. Clicking on the Submit link will redirect the user to the Submit page for that publication.

**NOTE:** Technical Summary is a special case. A Submit link will not appear until a Final Report has been submitted.

### Publications

<table>
<thead>
<tr>
<th>Project Capsule</th>
<th>View</th>
</tr>
</thead>
<tbody>
<tr>
<td>4/15/2013 - Project Capsule Submitted to Project Manager Mr. Gavin Gauthreau - Ms. Bridget LeBlanc</td>
<td></td>
</tr>
</tbody>
</table>

### Final Report

**Submit**

### Research Implementation

**Submit**

### Fact Sheet

**Submit**

11. PRC Survey Details
This area will not have information until a project has a final report submitted. The Section 19 administrative staff will send the PRC members a survey to rate the project. Once there are responses, the information will be listed here.
4.3 **Review Biannual Report Checklist for ALL projects**

Click on the button to open a page that lists all projects that require a Biannual Report created for the current Biannual period.

Principal Investigators can use this list to see what Biannual Reports they need to Create for the current Biannual period.

Project Managers can use this list to see what PI's have or have not submitted a Biannual Report for the current Biannual period.

Group Administrators can use this list to see what PI's have or have not submitted a Biannual Report for the current Biannual period.
4.4 Review Annual Work Program Checklist for ALL projects
Click on the button to open a page that lists all projects with the most recent Annual Work Program report submitted.

ACCESS NOTE: Only LTRC employees can see this link.

4.5 Request Software Development Support
Click on the button to open a form to request services. Your name, email and date of request are automatically placed in the form and cannot be edited.
4.6 Go to Project Summary page for a Technical Assistance project

ACCESS NOTE: Only LTRC employees who are DOTD employees have these type of projects.

This area indicates any Technical Assistance Projects where the user is the PI or PM that do not have response date entered. No response date entered in the database assumes that it is an Active TA Project.

1. Click on the TA project number.
2. The user will be redirected to the TA Project Details page.

<table>
<thead>
<tr>
<th>Role</th>
<th>TA Project</th>
<th>Title</th>
<th>PM</th>
<th>PI</th>
<th>Request Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager</td>
<td>13-03TA-GT</td>
<td>Settlement along LA 4 in Franklin, LA</td>
<td>Self</td>
<td>Kevin Gaspard</td>
<td></td>
</tr>
</tbody>
</table>
5 RPIC

ACCESS NOTE: All users DO NOT have access to all the links under this tab.

This webpage contains functions related to the acceptance, review and ranking of problem statements received by LTRC. Problem statements become LTRC research projects if approved by both the assigned Research Problem Identification Committee (RPIC) and Research Advisory Committee (RAC).

5.1 View Priority List

5.1.1 Search problem statements.

1. Select the year.

The returned list is sorted ascending based on the highest ranked problem statement.
2. Click on the **Export to Excel** link to download an Excel file of all the problem statements (all pages).

NOTE: There may be multiple pages in the list. Use the page numbers below the list to navigate the remainder of the list.

5.1.2 **View Problem Statement Details**

1. Complete Section 5.1.1 to get a list of problem statements.
2. Select the **Problem Statement number** to be redirected to Problem Statement Details page.
3. Click on **Download File** to get a MS Word document of the problem statement details.
5.2 Accept Problem Statement

5.2.1 Search problem statements

1. Fill out any combination of the choices explained below. No choices will result in a list of all problem statements ever received.
   a. Select Internal to search problem statements already accepted -or-
      Select External to accept a problem statement for consideration at next RPIC cycle.
   b. Select a year.
   c. Type a title, number or date range.
   d. Select the person who submitted the problem statement.

2. Click the Search button.

3. Click on the Export to Excel link (link below list) to download an Excel file of all the problem statements (all pages).

NOTE: There may be multiple pages in the list. Use the page numbers below the list to navigate the remainder of the list.
5.2.2 Accept Problem Statement

1. Complete Section 5.2.1 to get a list of problem statements.

2. Select the **Problem Statement number** to be redirected to Problem Statement Details page. This number is for the external waiting to be accepted database.

Once accepted the problem statement will be renumbered based on the number of accepted problem statements.
3. Click the **Accept Problem Statement** button to redirect the problem statement for future assignment to an RPIC Committee.

4. Click yes or no to question confirming the acceptance of the problem statement. Once accepted the problem statement will be **renumbered** based on the number of accepted problem statements.

5. Problem Statement Details page also has a **Download File** button.
The problem statement will get renumbered when it is moved to the internal database. This will be its permanent number for consideration in the RPIC Committees.
5.2.3 Download Problem Statement

1. Complete Section 5.2.1 to get a list of problem statements.

2. Click on View link to get an MS Word document of the problem statement details.

5.2.4 Edit Problem Statement

1. Click on Edit link to be redirected to Create Problem Statement page in Edit mode (Administrative permissions required). Problem statements in the External database (those not accepted) will not be editable until they are accepted and located into the Internal database.
2. Type any changes.
3. Click Submit button.
5.3 Research Problem Identification Committee

This link is for viewing the RPIC committees for any given year.

1. Select a year.
2. Select a Committee Name.
3. Click Search.

NOTE: There may be multiple pages in the list. Use the page numbers below the list to navigate the remainder of the list.
5.4 Research Advisory Committee

This link is for viewing the RAC committees for any given year.

1. Select a year.
2. Click Search.

NOTE: There may be multiple pages in the list. Use the page numbers below the list to navigate the remainder of the list.
5.5 View Assigned Committees

5.5.1 Search Problem Statements Assigned to RPIC Committee

Search Problem Statements Assigned by RPIC

| Search Problem Statements/Committee Members using Committee Names: |
| Select Year: 2015 ▼ |
| Select Committee Name: Traffic & ITS ▼ |

List of Problem Statements Assigned

Export Final Rating Sheet
Export Individual Rating Sheet

Click here to Download All

<table>
<thead>
<tr>
<th>No.</th>
<th>Problem Statement No.</th>
<th>Date Received</th>
<th>Title</th>
<th>Submitter</th>
<th>Affiliation</th>
<th>View File</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>15-132</td>
<td>3-19-2015</td>
<td>To determine the feasibility of utilizing aerial drones as a platform for traffic cameras</td>
<td>Rhett A. Desselle</td>
<td>DOTD</td>
<td>View</td>
</tr>
<tr>
<td>3</td>
<td>15-027</td>
<td>1-22-2015</td>
<td>A Highway Construction Work Zone Mobility Impact Assessment Tool</td>
<td>Jonathan Shi</td>
<td>Louisiana State University (LSU)</td>
<td>View</td>
</tr>
</tbody>
</table>

1. Select a year.
2. Select a committee.
3. Click Search Problem Statements button.
4. Click Here to Download All link to download a PDF file of all problem statements in detail form assigned to that committee for the year chosen.
5. Click on View link to download an MS Word file the problem statement listed to the left.
6. Click on Export Final Rating Sheet to download an excel file of the committee’s problem statements and committee members.
7. Click on Individual Rating Sheet to download an excel file of the committee’s problem statements for each member to individually rate the considered problem statements.
5.5.2 Search Committee Members Assigned to RPIC Committees

1. Select a year
2. Select a committee
3. Click Search Committee Members button

NOTE: There may be multiple pages in the list. Use the page numbers below the list to navigate the remainder of the list.

6 Project Management

ACCESS NOTE: All users have access to this main tab page and some of the links. The user must have PM role or higher permissions to access certain links on this webpage.
6.1 Create Proposed Project and AWP Sheet

This functionality is accessible to Project Managers and higher permissions.

### General Information

Create Proposed Project button should only be used if you know there is not already a project created. Use the View Project link (on left sidebar) to search by title or Project Manager to ensure that a project has not already been created.

- **Fiscal Year**: 2016-2017
- **Budget Category**: Select
- **Funding Source**: Select
- **Project Type**: Select
- **Project Status**: Proposed
- **Project Managers**: Select
- **Group Administrator**: Select

### Budget Status

- **Total Cost (Original)**: Enter the total cost of the project.
- **Total Cost (Revised)**: Enter the revised total cost of the project.
- **Total**:
- **Salaries**:
- **Equipment (non-expendable)**:
- **Travel**:
- **FYE Expenditures**:
- **Other**:

All INCREMENTAL COSTS are to be split appropriately between categories and included within the budget item.

### Purpose and Scope

Non-bulleted text:
- Text
- Continue with non-bulleted text

### Fiscal Year 2017-2018 Proposed Activities

Use the proposed activities as an outline and open text box format as needed.

If Equipment budget ≥ $5,000, FY Proposed Activities MUST include itemized detail list.

If Other budget ≥ 20% of fiscal year costs, FY Proposed Activities MUST include an itemized list.

Submit and Email

Save Edits

If the project creation is finalized, use Submit and Email button to email the Project Manager, Group Administrator and Associate Director that a new project has been created.
This screen should only be used AFTER the user verifies that a similar project does not already exist. Use View Project link (Section 6.2) to search projects that already exist.

The shadowed boxes cannot be edited.

1. Enter information into the project fields in the General information section.
   a. Edit the fiscal year if this project is being created for the current fiscal year rather than for the next fiscal year listed.
   b. There are Required fields. PMTS will give an informative error about which fields have not been filled or have the incorrect format.
   c. Follow the Indirect cost instructions and guidelines for the Equipment and Other categories.

2. Save Information.
   a. Click the Save Edits button to save the information to the database. No emails are sent.
      -Or-
   b. Click the Save and Email button to finalize the project and send emails that it was created.

In both cases, the person who clicked on the button will be copied on any email.

Both buttons will say “Saving...” while the database save is occurring. This is to prevent multiple button presses which could create duplicate projects.

If the save to the database is successful, the user will be redirected to the AWP Details page.
If the save to the database is not successful, then an informative error message will appear.
6.2 View Project

This functionality is accessible to all PMTS users. Edit and Delete functions require elevated permissions and are project based.

6.2.1 Search Projects

Search Projects

Search Projects using any of the following:

General Project Details

- Research Project Number:
- Funding Source: Select
- Actual Start Date (From):
- Actual Start Date (To):
- End Date (From):
- End Date (To):
- Select Project Status:
  - Ongoing
  - Completed
  - Proposed
  - Not Funded or Suspended
  - Publication Pending
  - Publication Past Due
- Select Project Type:
  - ST
  - T
  - P
  - B
  - ST
  - SS
  - C
  - SA
  - PF
  - TIRE ADMIN
  - LTAP
  - TT
  - Other
- Title:

Search
Clear All

1. Fill out any combination of the choices. No choices will result in a list of all projects in the database.
   - User may select one or more project status.
   - User may select one or more project type.
2. Click the Search button.
Click on the Export to Excel link (link below list) to download an Excel file of all the projects (all pages).

NOTE: There may be multiple pages in the list. Use the page numbers below the list to navigate the remainder of the list.
Click **Select** to be redirected to Project Details page. See Section 6.2.2 for instructions.

Click on **Edit** link to be redirected to Create Project page in Edit mode (Administrative permissions required). See Section 6.2.3 for instructions.

Click on **View** to be redirected to the state official document storage system Content Manager. The user can view and download documents there.

Click on **Load** to view the project’s summary page. See Section 6.2.5 for instructions.

6.2.2 **View Project**

1. Complete Section 6.2.1 to get a list of projects.
2. Click **Select** to be redirected to Project Details page.

3. Click on **Edit Details** to be redirected to Create Project page in Edit mode (Administrative permissions required). See Section 6.2.3 for instructions.
4. Click on **Budget Report** link to be redirected to the Project Budget report.
5. The Delete Project button will appear if the project is proposed and has no budget number assigned. If not, then a detailed message will appear instead.
6.2.3 Edit Project

1. Complete Section 6.2.1 to get a list of projects.

View All Projects

<table>
<thead>
<tr>
<th>Select</th>
<th>Research Project Number</th>
<th>State Project Number</th>
<th>Title</th>
<th>Project Manager</th>
<th>End Date</th>
<th>Status</th>
<th>Funding Source</th>
<th>Edit</th>
<th>Content Manager</th>
<th>Project Summary</th>
</tr>
</thead>
</table>

2. Click on Edit link to be redirected to Create Project page in Edit mode (Administrative permissions required).

Gray fields are disabled. The Project Details page will disable or allow editing of different fields based on project status and the permissions of the user.

Modify Project Details

- General Project Details
  - Project Number: 14-SSS
  - State Project Number: DOTLT1000018
  - Title: LTRC Project Management and Tracking System Upgrade

- Funding Sources:
  - SPR: TT-Fed/TT-Req

- Project Status:
  - Ongoing

- Project Manager: Zhongjie Zhang

- Project Task:
  - Proposed Start Date: 7/1/2014
  - Actual Start Date: 11/1/2014
  - Original End Date: 7/31/2016
  - Revised End Date: 7/31/2018

3. Enter/edit information into fields desired.

4. Click the Submit button to save the changes to the database.
   If the save is successful, the user will be redirected to the Project Details page.
   If the save is not successful, then an informative error message will appear.
If the project is not already assigned an LTRC project number, the **Set LTRC Project number** button will automatically appear. This may be used to number THIS project with the next sequential project number based on the current fiscal year and the project type. PROJECT SHOULD ALWAYS BE NUMBERED USING THE SECOND CALENDAR YEAR OF THE FISCAL YEAR (for 2015-2016 fiscal year, project start with 16-).

**Modify Project Details**

1. **General Project Details**

2. **Set LTRC Project Number**: Automatically

Currently, only one of the LTRC project numbers will be used on the first 19 project types. It will only work for the first 19 projects. After that, the number will incorrectly shift back to counting from 1.

### 6.2.4 View Project Summary Page

1. Complete Section 6.2.1 to get a list of projects.

2. Click on **Load** link to be redirected to Project Summary page.
This page lists all types of information for the project in one place versus the multiple pages throughout PMTS. This page is information only. No information can be edited.

**Project Summary Page for 14-5SS**

**LTRC Project Management and Tracking System Upgrade**

Go Back to myLTRC page

### Project Details

<table>
<thead>
<tr>
<th>Name</th>
<th>PI</th>
<th>Status</th>
<th>PI</th>
<th>Proposed Start</th>
<th>Actual Start</th>
<th>Proposed End</th>
<th>Revised End</th>
<th>View</th>
</tr>
</thead>
<tbody>
<tr>
<td>LTRC Project Management and Tracking System Upgrade</td>
<td>Zhongjie Zhang</td>
<td>Ongoing</td>
<td>Self</td>
<td>7 01 2014</td>
<td>11 01 2014</td>
<td>7 31 2015</td>
<td></td>
<td>View</td>
</tr>
</tbody>
</table>

### Budget Details

Original Budget: $125,266.00  Revised Budget: No Project Budget revision on record

<table>
<thead>
<tr>
<th>S/NO</th>
<th>Fiscal Year</th>
<th>Budget Group</th>
<th>Cost Element Name</th>
<th>Cost as of 06/30/2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>14-5SS/DOTLT1000018</td>
<td>Total</td>
<td>Total</td>
<td>$41,877.18</td>
<td></td>
</tr>
</tbody>
</table>

### Biannual Details

#### 6.2.5 Delete Project

1. Complete Section 6.2.1 to get a list of projects.

**View All Projects**

Click on 'View' to see the details of the selected Projects

<table>
<thead>
<tr>
<th>Select</th>
<th>Research Project Number</th>
<th>State Project Number</th>
<th>Title</th>
<th>Project Manager</th>
<th>End Date</th>
<th>Status</th>
<th>Funding Source</th>
<th>Edit</th>
<th>Content Manager</th>
<th>Project Summary</th>
</tr>
</thead>
</table>
2. Click **Select** to be redirected to Project Details page.

### Project Details

- **Research Project Number:** 16-2GT
- **Title:** Development of Software Solutions for Fpe Design in Louisiana
- **Project Manager:** Zhongjie Zhang
- **Budget Category:** FHWA
- **Funding Source:** SPR: TT-Fed/TT-Reg
- **Actual Start Date:** 2/28/2016
- **Original End Date:** 9/1/2016
- **Project Status:** Proposed
- **Agency:** LTRC
- **Group Administrator:** Zhongjie Zhang
- **Comment:**
- **Co-Principal Investigator:**

![Budget Report for 16-2GT](image)

The Delete Project button will appear if the project is in proposed status and has no budget number assigned. If not, then a detailed message will appear instead.

**WARNING:** Make sure you are certain that this project needs to be deleted.

The system will not confirm you want to delete. Clicking this button will remove all traces of a project in the database including AWP and biannual submissions.

3. Click on **Delete Project.**
### 6.3 View PRC

This functionality is accessible to all PMTS users for viewing PRC membership for the projects with which the user is affiliated. Create New, Add, Edit and Remove functions require elevated permissions.

#### 6.3.1 Create PRC for a Project

1. Select a project.
   -or-
   Select a Title (for projects that have not been assigned a project number yet).
2. Click **Create New** button. Button only appears for Administrative permissions.
3. Click **Create Committee** button. This panel appears.

4. Select a Member from the drop down list. 
   **Note:** If the member is not listed, use the instructions listed in Section 11.1 to first add the person as a user in PMTS. The person only needs to be a user in PMTS rather than a have a login to PMTS.
5. Click **Add as Chairman**
   - or -
   Click **Add as Member**
   Click only one button per user selected. A user cannot be a chair and also a member of a project's PRC.
6. If applicable, repeat steps 5 and 6 for all members to be added to the PRC.
7. If applicable, click **Remove** if a member was added by mistake.
8. If applicable, click **Export Member List** to download an MS Excel file of the PRC members for the project chosen.
6.3.2 View PRC Membership for a Project
1. Select a project.
   -or-
   Select a Title (for projects that have not been assigned a project number yet).
2. Click the Search button.

A panel appears with the information for the PRC.

3. Click on Export Member List to download an MS Excel file of the PRC members for the project chosen (if applicable).
6.3.3 Add or Remove a PRC Member; Add a Chair to a PRC

1. Complete Section 6.3.1 or 6.3.2 to get this panel.

2. Click Add/Remove Member.
To Add or Change a Member or Chair

3. Select a Member from the drop down list.
   **Note**: If the member is not listed, use the instructions listed in Section 11.1 to first add the person as a user in PMTS. The person only needs to be a user in PMTS rather than have a login to PMTS.

4. Click **Add as Chairman** -or- **Add as Member**.
   Click **Add as Member**.
   
   Click only one button per user selected. A user cannot be a chair and also a member of a project’s PRC.
   
   If the person is already a member of the PRC, they must be removed first and then added back as the Chair.

5. If applicable, repeat steps 5 and 6 for all members to be added to the PRC.
6. If applicable, click **Remove** if a member was added by mistake.
7. If applicable, click **Export Member List** to download an MS Excel file of the PRC members for the project chosen.

To Remove a Member or Chair

1. Click **Remove**.
2. Repeat for all members desired to be removed.
6.4 Communications

This functionality is accessible to all PMTS users.

This page exports MS Excel files of user email or physical mail addresses based on the criteria searched and the button clicked.

**Communications**

1. Fill out any combination of the choices. No choices will result in a list covering all the projects in the database.
2. Click Get Email List to download an MS Excel file containing email addresses categorized by designation of Principal Investigator, Project Manager, Group Administrator or Co-Principal Investigator based on the project(s) searched.
3. Click Get PI Addresses to download an MS Excel file containing the physical mail addresses of personnel designated as Principal Investigators based on the project(s) searched.
4. Click Get PRC Members to download an MS Excel file containing the email addresses of personnel designated as PRC members based on the project(s) searched.
6.5 Project Files

This functionality is accessible to all PMTS users.

This page sends search terms and redirects the user to the state official document storage system Content Manager. The user can view and download documents there.

Only one project at a time may be searched.

1. It is best to fill in either the LTRC project number or the State Project Number but not both.
2. Click Search.
6.6 Project Tasks

This functionality is accessible to user with Project Manager or higher permissions.

6.6.1 Enter Project Task

1. Select a project from the drop-down list. A project must be in Ongoing status to be included in this list.
2. Select a Task Order number for the task.
3. Enter a Title for the task to be added.
4. Click Add Task button.

The task list panel appears listing all tasks for a project.
5. Repeat steps 2-4 for all tasks associated with a project.
### 6.6.2 Edit Project Task
The user must have completed section 6.6.1 each time the Project Tasks page is opened in the browser before any editing can be done.

1. Click **Edit**. That row now becomes editable.

2. If applicable, select the **task order** number.
3. If applicable, edit text in the **task title** column.
4. Click **Update** to save the changes to the database. Click **Cancel** to exit out with a rating or comments saved.
5. Repeat steps 1-5 for any tasks that need to be edited.

### 6.6.3 Delete Project Task
1. Click **Delete**.
2. Repeat for any tasks that need to be removed from the project.
6.7 Create AWP Sheet

-General Project Information (For Reference Only. Edit using View project)

Title: 
Budget Category: 
Funding Source: 
Project Type: 
Project Status: 
Prime/Share Project Number: 
Prime PI/Share Project Number: 
Research Agency: 
Principal Investigator: 
Group Administrator: 

- Fiscal Year 

2017-2018 

- Check that fiscal year is correct

-Budget Status

Total Budget: 
Estimated FY 2017-2018 Budget: 

Total Cost (Original): 
Total Cost (Revised): 

Net, Expanded to Date: 
FY 2016-2017 Budget: 

Consumable Supplies & Materials: 
Equipment (non-expendable): 
Travel: 
Other: 

Purpose and Scope

Fiscal Year 2016-2017 Accomplishments

Fiscal Year 2017-2018 Proposed Activities

- Please use the following format for bulleted lists in order to facilitate the printing of the Annual Work Program documents:
- Text
- Continue with non-bulleted text.

If Equipment budget > $5,000, FY Proposed Activities MUST include an itemized list.
If Other budget > 20% of fiscal year costs, FY Proposed Activities MUST include an itemized list.

Use Save Edit button to save current information. This will allow you to add or edit information later.

Submit and Email

If you want to submit the AWP Sheet, use the Submit and Email button. If the project has been approved, the Project Manager, Group Administrator and Associate Director will be notified.
1. Select a project from the drop-down list. This list should only be the projects with which you are affiliated and the project is in ongoing, publication past due or publication pending status.

2. Click Search.

If the AWP Sheet for the Fiscal Year already exists, the details (previously saved) will be automatically populated and a message will be displayed.

If the user selects a previous AWP and clicks Populate FY Funds (Original) and Text Paragraphs below from Previous AWP, the system will auto-populate certain fields. ViewDocument creates a PDF for download of the document chosen.
3. Enter or edit information. The shadowed boxes cannot be edited.
   a. Fields in the Budget Status section. If this is the first AWP year then the user can place $0 in the previous fiscal year budget section. There are required fields. PMTS will give an informative error about which fields have not been filled or have the incorrect format. Follow the Indirect cost instructions and guidelines for the Equipment and Other categories.

   b. Edit the fiscal year if this project is being created for the current fiscal year rather than for the next fiscal year listed.
c. **Enter Purpose and Scope, Accomplishments, and Proposed Activities information.** If auto-populated, edit information or leave as is if appropriate. All of these are **REQUIRED** fields. If this is the first AWP Sheet for a project then the user may enter N/A into the Accomplishments section. Be sure to include itemized lists for Equipment and Other categories if needed. PMTS will give an informative error about which fields have not been filled or have the incorrect format.

4. **Save Information.**
   a. Click the **Save Edits** button to save the information to the database. No emails are sent.

   -Or-

   b. Click the **Submit and Email** button to finalize the project and send email to the project manager and that it was finalized.

   The person who clicked on the button will be copied on any email.

   If the project has a Co-Principal Investigator identified, that Co-PI will be emailed.

   Both buttons will say “Saving...” while the database save is occurring. This is to prevent multiple button presses which could create duplicate projects.

   If the save to the database is successful, the user will be redirected to the AWP Details page.

   If the save to the database is not successful, then an informative error message will appear.

---

<table>
<thead>
<tr>
<th>Fiscal Year 2016-2017 Accomplishments</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Fiscal Year 2017-2018 Proposed Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>
6.8 View AWP Sheet

This functionality is accessible to all PMTS users. Edit and Delete functions are project based.

<table>
<thead>
<tr>
<th>Project Functions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create Proposed Project and AWP Sheet</td>
</tr>
<tr>
<td>View Project</td>
</tr>
<tr>
<td>View PRC</td>
</tr>
<tr>
<td>Communications</td>
</tr>
<tr>
<td>Project Files</td>
</tr>
<tr>
<td>Project Tasks</td>
</tr>
<tr>
<td>Annual Work Program</td>
</tr>
<tr>
<td>Create AWP Sheet</td>
</tr>
<tr>
<td>View AWP Sheet</td>
</tr>
<tr>
<td>AWP Reports</td>
</tr>
<tr>
<td>Biannual Reports</td>
</tr>
<tr>
<td>Create Biannual Report</td>
</tr>
<tr>
<td>View Biannual Report</td>
</tr>
<tr>
<td>Search Project Expenses</td>
</tr>
<tr>
<td>Project Expense History</td>
</tr>
<tr>
<td>FY Contract Expenses</td>
</tr>
<tr>
<td>Implementation</td>
</tr>
<tr>
<td>Create Assessment Report</td>
</tr>
<tr>
<td>View Assessment Report</td>
</tr>
<tr>
<td>Create Summary Report</td>
</tr>
<tr>
<td>View Summary Report</td>
</tr>
<tr>
<td>TA Projects</td>
</tr>
<tr>
<td>Create TA Project</td>
</tr>
<tr>
<td>View TA Projects</td>
</tr>
</tbody>
</table>

### Annual Work Program

**Search Projects using any of the following:**

<table>
<thead>
<tr>
<th>General Project Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fiscal Year:</td>
</tr>
<tr>
<td>Research Project Number:</td>
</tr>
<tr>
<td>Funding Source:</td>
</tr>
<tr>
<td>Actual Start Date (From):</td>
</tr>
<tr>
<td>Actual Start Date (To):</td>
</tr>
<tr>
<td>End Date (From):</td>
</tr>
<tr>
<td>End Date (To):</td>
</tr>
<tr>
<td>Group Administration:</td>
</tr>
</tbody>
</table>

**Agency:**

<table>
<thead>
<tr>
<th>Project Status:</th>
<th>Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budget Category:</td>
<td>Select</td>
</tr>
<tr>
<td>Amount Requested ($)</td>
<td></td>
</tr>
<tr>
<td>Project Manager:</td>
<td>Select</td>
</tr>
<tr>
<td>Principal Investigator:</td>
<td>Select</td>
</tr>
</tbody>
</table>

**Select Project Type:**

| GT | P | B | ST | SS | C | SA | RE | TIRE ADMIN | LTAP | TT | Other |

**Title:**

| Search | Clear All |
6.8.1 Search AWP Sheet

1. Select a Fiscal Year.
2. Fill out any combination of the choices. No choices will result in a list of all projects in the database for the fiscal year chosen.
   - User may select one or more project type.
3. Click the Search button.

Click on [Click here to Download all selected Annual Work Program Sheets at once](#) link to download one PDF file all the AWP Sheets listed (all pages).

Click on the [Export to Excel](#) link to download an MS Excel file of all the projects (all pages).

NOTE: There may be multiple pages in the list. Use the page numbers below the list to navigate the remainder of the list.
Click **Select** to be redirected to Project Details page. See Section 6.8.2 for instructions.

Click on **Edit** link to be redirected to Create Project page in Edit mode. See Section 6.8.3 for instructions.

Click on **View** to download the selected AWP sheet as a PDF document.

### 6.8.2 View AWP Sheet/Delete AWP Sheet

1. Complete Section 6.8.1 to get a list of AWP sheets for a chosen fiscal year.
2. Click **Select** to be redirected to AWP Details page.
3. Click on Download File link to download a PDF file of the AWP Sheet.
4. Click on Edit Details to be redirected to Create Project page in Edit mode. See Section 6.8.3 for instructions.
5. The Delete AWP button will remove the AWP submission from the database permanently.
6.8.3 Edit AWP Sheet

1. Complete Section 6.8.1 to get a list of projects.

2. Click on **Edit** link to be redirected to Create AWP page in Edit mode (project or system administrative required to see link).

3. Enter/edit information into fields as desired. Shadowed textboxes cannot be edited.

   Some of these are **REQUIRED** fields. PMTS will give an informative error about which fields have not been filled or have the incorrect format.

   Follow the **Indirect cost instructions** and guidelines for the Equipment and Other categories.

   See section 6.7 to view Create AWP fields as they appear on the screen.

5. Save Information.
   a. Click the **Save Edits** button to save the information to the database. No emails are sent.

   - Or -

   b. Click the **Submit and Email** button to finalize the project and send email to the project manager and that it was finalized.

   The person who clicked on the button will be copied on any email.

   If the project has a Co-Principal Investigator identified, that Co-PI will be emailed.

   Both buttons will say “Saving...” while the database save is occurring. This is to prevent multiple button presses which could create duplicate projects.

   If the save to the database is successful, the user will be redirected to the AWP Details page.
If the save to the database is not successful, then an informative error message will appear.

6.8.4 Download AWP Sheet

1. Complete Section 6.8.1 to get a list of projects.

2. Click on View link to download the selected AWP sheet as a PDF document.
6.9 **AWP Reports**

These budget reports will return projected costs for all projects grouped by funding source. The reports are further grouped by project type and budgets are totaled by both fiscal year and total project cost.

### 6.9.1 View/Export AWP Summary Sheet for a Fiscal Year (Grouped by Funding Category)

This report returns the budgets totals by funding category further broken into project type groupings. Individual project details are included.

1. Select a **fiscal year**. This is required or no budget information will be returned.
2. Select the links labeled **Sheets 1-11** based on which category is of interest to the user. This report only returns Ongoing projects.
A separate browser window opens with the budget report.

3. View or export the report.
   a. Use the scroll bars to see other rows/columns.
   b. Use arrows to navigate multiple pages (if applicable).
   c. Use disk icon to export the report (all pages) in PDF, Excel or Word format.
6.9.2 View/Export the AWP Budget Recap Sheet

This report is a MS Word file that lists the budget totals by funding category further broken into active and proposed project status. No individual project details are shown here, just total budget number across all projects of a funding category.

**Annual Work Program Reports**

1. Select a fiscal year. This is required or no budget information will be returned.
2. Click the **Budget Recap Sheet** link to download an MS Word file.
6.9.3 View/Export AWP Sheet for a Fiscal Year (Grouped by Funding Category)

This is not a report, but the individual AWP sheet documents created using Create AWP screen (with budget information and activities). These are grouped by budget category and then further grouped by project type. Projects in ongoing and proposed status are included. No grouped project budget totals are included.

Annual Work Program Reports

Select Fiscal Year: [Select]

Click on the following links to view and export the AWP Summary sheets:

- Sheet 1: Research Administrative and Support Items
- Sheet 2 & 3: FHWA - SPR: TT-Fed/TT-Reg
- Sheet 4: FHWA - Pooled Fund
- Sheet 5: FHWA - SPR: External Collaborations
- Sheet 6: FHWA - Grant
- Sheet 7: FHWA - STR: TT-Fed
- Sheet 8: State
- Sheet 9: Federal
- Sheet 10: Self-Generated
- Sheet 11: Other DOTD Sections

Click on the following links to view and export the AWP Budget Recap Sheets:

Budget Recap Sheet

Click on the following links to view and export the AWP Sheets:

- 1: Research Administrative and Support Items
- 2 & 3: FHWA - SPR: TT-Fed/TT-Reg
- 4: FHWA: Pooled Fund
- 5: FHWA - SPR: External Collaborations
- 6: FHWA - Grant
- 7: FHWA - STR: TT-Fed
- 8: LTAP
- 9: State
- 10: Federal
- 11: Self-Generated
- 12: Other DOTD Sections

Click on the following link to create the Research Encumbrance Worksheet:

Encumbrance Worksheet (MS Excel)

1. Select a fiscal year. This is required or no budget information will be returned.
2. Select the links labeled 1-12 based on which category is of interest to the user. An MS Word file is created for download.
6.9.4 Export the Research Encumbrance Worksheet

This link appears only those with Administrative permissions. It is used in the budget planning and tracking. It returns projects grouped by funding code and project type. Each project type is further split into Active and Proposed projects.

Annual Work Program Reports

Select Fiscal Year

Click on the following links to view and export the AWP Summary sheets:

Sheet 1: Research Administrative and Support Items
Sheet 2 & 3: FHWA - SPR: TT-Fed/TT-Reg
Sheet 4: FHWA - Pooled Fund
Sheet 5: FHWA - SPR: External Collaborations
Sheet 6: FHWA - Grant
Sheet 7: FHWA - STP: TT-Fed
Sheet 8: State
Sheet 9: Federal
Sheet 10: Self-Generated
Sheet 11: Other DOTD Sections

Click on the following links to view and export the AWP Budget Recap Sheets:

Budget Recap Sheet

Click on the following links to view and export the AWP Sheets:

1: Research Administrative and Support Items
2 & 3: FHWA - SPR: TT-Fed/TT-Reg
4: FHWA - Pooled Fund
5: FHWA - SPR: External Collaborations
6: FHWA - Grant
7: FHWA - STP: TT-Fed
7: LTAP
8: State
9: RREC List
10: Federal
11: Self-Generated
12: Other DOTD Sections

Click on the following link to create the Research Encumbrance Worksheet:

Encumbrance Worksheet (MS Excel)

1. Select a fiscal year. This is required or no budget information will be returned.
2. Click the Encumbrance Worksheet link to download the MS Excel file.
6.10 Create Biannual Report

Create Biannual Research Report

Select a Project using the following:

Research Project Number: Select

Search Reset Selection

General Information

For Period Ending: 12/31/2015

Funding Source: Select

Budget Status

Total Budget
Total Cost (Original)
Total Cost (Revised)
Est. Expenditure (to Date):
FY 2016-2018 Budget
FY Funds (Original)
FY Funds (Revised)
FY Expenditure (to date):

Part I. Principal Investigator

Accomplishments this period (Include any problems on which assistance is needed)

Part II. LTRC Manager’s Comments

On Time On Budget

Part III. LTRC Technology Transfer Manager’s Comments

Assessment of Benefits and recommended implementation strategies

Save Edits
Submit and Email

If as the PI you want the Biannual Report finalized, use Submit and Email button to email the Project Manager.
If as the Project Manager you want the Biannual Report finalized, use Submit and Email button to email the Group Administrator.
1. Select a project from the drop-down list. This list should only be the projects with which you are affiliated and the project is in ongoing or publication pending status.

Create Biannual Research Report

2. Click Search.

Fields will be auto-populated. These fields will turn green. The information has been saved so the auto-populated fields were captured. A description of how they will be populated is described below. Screen examples below are for a December Biannual being created.

a. If the project does not have biannual for this time period, the system will look for this fiscal year AWP Sheet and the most recent biannual. The following fields will be auto-populated by the system and turned green.

1. If December biannual is being created:
   - FY Funds Original (populated from AWP for this FY) disabled for edit
   - Progress Percentage (taken from the last biannual)
   - Active Project Tasks (taken from the last biannual or project tasks if no previous biannual), if 100% then colored gray disabled for editing
   - Proposed Project Tasks (copied as blank from the project), if active task was 100% then will not show in list

2. If July biannual is being created:
   - FY Funds Original (populated from AWP for this FY),
   - FY Funds Revised (taken from December biannual if there)
   - Progress Percentage (taken from the last biannual)
   - Active Project Tasks (taken from the last biannual or project tasks if no previous biannual), if 100% then colored gray disabled for editing
   - Proposed Project Tasks (copied as blank from the project), if active task was 100% then will not show in list

b. If a biannual already exists for period ending date, then the details will be loaded into this page in edit mode without any colorings. See section 6.11.3 for instructions.
3. Enter/edit information into budget status area as desired. Shadowed textboxes cannot be edited.

Progress(%) is a required field. If it is green it is auto-populated from the last biannual report.
Green fields were pulled from the previous AWP Sheet and/or a previous Biannual. The information has been saved in the autoplaced fields were captured. After you edit the text in a green field, it will turn blue. However, the change will NOT be saved to the database until you click the Save or Submit button. If you leave this page without making edits, clicking on the save or clicking on the submit button, use View Biannual to edit the biannual report.

**Part I. Principal Investigator**

Accomplishments this period (include any problems which assistance is needed)

<table>
<thead>
<tr>
<th>Task Order</th>
<th>Task Title</th>
<th>Task Description</th>
<th>% Completed</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>PMTS Version 1 initial system evaluation</td>
<td></td>
<td>100</td>
</tr>
<tr>
<td>2</td>
<td>PMTS Version 1 Debugging and Thorough System Evaluation</td>
<td></td>
<td>100</td>
</tr>
<tr>
<td>3</td>
<td>PMTS Version 1 Immediate Corrections</td>
<td></td>
<td>100</td>
</tr>
<tr>
<td>4</td>
<td>Conduct Informational Meetings for PMTS Version 2</td>
<td>These meetings were done December 2014 - February 2015.</td>
<td>100</td>
</tr>
<tr>
<td>5</td>
<td>Develop Interim Report</td>
<td>Submitted to PM 31 March 2015</td>
<td>100</td>
</tr>
<tr>
<td>6</td>
<td>Develop PMTS Version 2</td>
<td>Programming has been performed continuously. PI estimates initial programming of enhancement list (included in interim report) is 75% complete. A Windows 2008 server has been configured and could be used to replace</td>
<td>75</td>
</tr>
</tbody>
</table>
4. Enter/edit information into task fields as desired.

After you edit the text in a green field, it will turn blue. However, the change WILL NOT be saved to the database until you click the Save or Submit button. If you leave this page without making edits, clicking on the save or clicking on the submit button, use View Biannual to edit this biannual report.

Shadowed textboxes cannot be edited and should be tasks that are 100% complete.

a. Principal Investigators enter information into the Part I section, both the active task list (previous page graphic) and the Proposed task List (above). Task List for this period will show tasks on details page and downloads even if the percentage is zero and no information has been added to the task description.

Proposed tasks with no information entered will not be included in any details page or downloads of the report.

Some of these are REQUIRED fields. PMTS will give an informative error about which fields have not been filled or have the incorrect format.

b. Project Manager’s enter their comments in the Part II section.

c. Part III cannot be edited as it is read-only and copied from the Summary Report created and edited by the Technology Manager (see Section 6.17).
5. Save Information.
   a. Click the **Save Edits** button to save the information to the database.
      - The system will check if you have not changed any active or proposed tasks, and it will prompt you to confirm before saving.
      - The information is saved to the database.
      - No emails are sent.
      - You are not redirected from the page.
      - The colorings will remain until you leave this Create Biannual page.

   - Or -

   b. Click the **Submit and Email** button to finalize the report and send email to the project manager or group administrator that it was finalized.
      - The system will check if you have not changed any active or proposed tasks, and it will prompt you to confirm before saving.
      - The edits are saved.
      - Emails are sent.
      - If the project has a Co-Principal Investigator identified, that Co-PI will be emailed.
      
      Note: If the person logged in is the PI on the project, then it sends an email to the PM of the project. If they are PM on the project, the Group Admin will be emailed.
      
      Assumption is that the Group Admin will let the Associate Director know when all
biannually are complete from his research project types. Also the Associate Director has a biannual report he can to run to know which projects have a current biannual report and which do not have a biannual report submitted.

The person who clicked on the button will be copied on the email.

Both buttons will say “Saving...” while the database save is occurring. This is to prevent multiple button presses which could create duplicate reports.

If the save to the database is successful, the user will be redirected to the Biannual Details page.

If the save to the database is not successful, then an informative error message will appear.
6.11 View Biannual Report

This functionality is accessible to all PMTS users. Edit and Delete functions are project based.

6.11.1 Search Biannual Report

1. Select a Period Ending Date.
2. Fill out any combination of the choices. No choices will result in a list of all projects in the database for the period chosen.
   - User may select one or more project type.
3. Click the Search button.
Click on the Click here to Update Technology Manager Comments for the current time period will copy the comments entered via the Summary Report (see section 6.17.2) to each project biannual for the current biannual period. This only needs to be clicked once per biannual period by the Section 19 Administrative office.

Click on the Click here to Download all Selected Biannual Research Reports at once link to download one PDF file all the AWP Sheets listed (all pages).

Click on the Export to Excel link to download an MS Excel file of all the projects (all pages).

NOTE: There may be multiple pages in the list. Use the page numbers below the list to navigate the remainder of the list.
Click here to Update Technology Manager Comments for the current time period

View All Projects

Click here to Download all selected Biannual Research Reports at once

<table>
<thead>
<tr>
<th>Select</th>
<th>Research Project Number</th>
<th>State Project Number</th>
<th>Period Ending Date</th>
<th>Title</th>
<th>Status</th>
<th>Funding Source</th>
<th>Edit</th>
<th>Download PDF</th>
</tr>
</thead>
</table>

Click **Select** to be redirected to Biannual Report Details page. See Section 6.11.2 for instructions.
Click on **Edit** link to be redirected to Create Biannual Report page in Edit mode.

**NOTE:** Edit only appears if it is the report for this current biannual period and if you are affiliated with the project. See Section 6.11.3 for instructions.
Click on **View** to download the selected Biannual Report as a PDF document. See Section 6.11.4 for instructions.
Click on **Email PRC** to send this biannual to all members of the PRC for this project. See Section 6.11.5 for instructions.

6.11.2 View Biannual Report

1. Complete Section 6.11.1 to get a list of biannual reports for a chosen period.
2. Click **Select** to be redirected to Biannual Report Details page.
3. Click on **Download File** link to download a PDF file of the biannual report.
4. Click on **Edit Details** to be redirected to Create Biannual Report page in Edit mode. See Section 6.11.3 for instructions.
6.11.3 Edit Biannual Report

1. Complete Section 6.11.1 to get a list of projects.

2. Click the Edit link to be redirected to Create Biannual Report page in Edit mode. It must be the current biannual period and you must be the PI, PM or Group Admin on that project to see the Edit link.

3. Enter/edit information into budget status area as desired. Shadowed textboxes cannot be edited.

Progress(%) is a required field.
4. Enter/edit information into task fields as desired. Shadowed textboxes cannot be edited.
   a. Principal Investigators enter information into the Part I section, both the Active Task list and the Proposed task List (above).
Task List for this period will show tasks on details page and downloads even if the percentage is zero and no information has been added to the task description.

Proposed tasks with no information entered will not be included in any details page or downloads of the report.

Some of these are **REQUIRED** fields. PMTS will give an informative error about which fields have not been filled or have the incorrect format.

b. Project Manager’s enter their comments in the Part II section.

c. Part III cannot be edited as it is read-only and copied from the Summary Report created and edited by the Technology Manager (see Section 6.17).

5. **Save Information.**

   c. Click the **Save Edits** button to save the information to the database. No emails are sent.

   -Or-

   d. Click the **Submit and Email** button to finalize the report and send email to the project manager or group administrator that it was finalized.

   The person who clicked on the button will be copied on any email.

   If the project has a Co-Principal Investigator identified, that Co-PI will be emailed.

   Both buttons will say “Saving…” while the database save is occurring. This is to prevent multiple button presses which could create duplicate projects.

   If the save to the database is successful, the user will be redirected to the Biannual Details page.

   If the save to the database is not successful, then an informative error message will appear.
6.11.4 Download Biannual Report

1. Complete Section 6.11.1 to get a list of Biannual Reports.

2. Click on View link to download the selected Biannual Report as a PDF document.

6.11.5 Email Biannual Report to PRC

1. Complete Section 6.11.1 to get a list of Biannual Reports.

2. Click on Email PRC link to email the selected Biannual Report to all the project's PRC members. The Section 19 Admin Manager and the Associate Director for Research will be copied.

   A separate email will be sent to a Co-Principal Investigator if one is identified for the project. The PI, Section 19 Admin Manager and the Associate Director for Research will be copied.

   The system will indicate in No PRC for the project and will not email anything.

   The system will place A “sent” if you have already clicked the email button on this session.

   The correct indications of Email PRC, No PRC or Sent will be indicated as you change pages at the bottom.

   **CAUTION: IF YOU LEAVE THIS PAGE or REDO A BIANNUAL SEARCH THE “SENT” INDICATION WILL NOT WORK.**
6.12 Project Expense History

This report gives the budget information for expenses charged to the project over the life span of the project(s) searched.

1. Fill out any other combination of the choices. No choices will result in a list of all projects.
   - User may select more than 1 project type.

2. Click the View Report button.
   a. Use the scroll bars to see other rows/columns.
   b. Use arrows to navigate multiple pages (if applicable).
   c. Use disk icon to export the list (all pages) in PDF, Excel or Word format.
3. Click the symbol next to the LTRC project number to expand the project expenditures grouped by years.

4. Click the symbol next to the particular fiscal year of interest.
5. Click the symbol next to the particular cost category of interest.

   The total line sums the expenditures for the entire life cycle of the project. The "as of" date is the date budget data was last downloaded from the state la.gov system. There will always be lag time from when actual expenses are submitted and when this report reflects them.
6.13 FY Contract Expenses

This report gives the external contract budget expenses for this fiscal year of the project(s) searched.

**Fiscal Year Contract Expenses Search by Year**

![Search Projects using any of the following:](image)

1. Select a Fiscal year.
2. Fill out any other combination of the choices. No choices will result in a list of all projects.
   - User may select more than 1 project type.
3. Click the View Report button.
Use the scroll bars to see other rows/columns.
Use **arrows** to navigate multiple pages (if applicable).
Use [disk icon](#) to export the list (all pages) in PDF, Excel or Word format.
The "as of" date is the date budget data was last downloaded from the state la.gov system. There will always be lag time from when actual expenses are submitted and when this report reflects them.
1. Select a **project** from the drop-down list.
   This list only shows projects with which you are PI, PM or GA (Admin permissions can see all projects). If a project is not in the drop down list it may already have a Research Assessment report associated with it. See Section 6.15.3 to edit a Research Assessment Report.

2. Enter information into all **sections**.
   PMTS will give an informative error about which fields have not been filled or have the incorrect format.

3. Click the **Save** button.
   Save button will redirect the user so they will no longer be able to enter information. At this point, see section 6.15.3 to edit a Research Assessment report.
6.15 View Assessment Report
This functionality is accessible to all PMTS users. Edit function is project based.

### 6.15.1 Search Research Assessment Report

1. Fill out any combination of the choices. No choices will result in a list of all projects in the database for the fiscal year chosen.
   - User may select one or more project type.
2. Click the Search button.
Click on **Click here to Download all Selected Reports** at once link to download one MS Word file with all the Research Assessment reports listed (all pages).

Click on the **Export to Excel** link to download an MS Excel file of all the projects (all pages).

**NOTE:** There may be multiple pages in the list. Use the page numbers below the list to navigate the remainder of the list.

Click **Select** to be redirected to Research Assessment report details page. See Section 6.15.2 for instructions.

Click on **Edit** link to be redirected to Create Research Assessment report page in Edit mode. See Section 6.15.3 for instructions.

Click on **View** to download the selected Research Assessment report as a MS Word document.

### 6.15.2 View Research Assessment Report

1. Complete section 6.15.1 to get a list of Research Assessment reports.
2. Click **Select** to be redirected to Research Assessment Report Details page.
6.15.3 Edit Research Assessment Report

1. Complete section 6.15.1 to get a list of Research Assessment reports.
2. Click Edit to be redirected to Research Assessment Report Details page.

3. Enter information into all sections. PMTS will give an informative error about which fields have not been filled or have the incorrect format.
4. Click the Save button. Save button will redirect the user so they will no longer be able to enter information. Repeat steps 1-4 if additional information needs to be added or edited.
6.15.4 Download Research Assessment Report

1. Complete section 6.15.1 to get a list of Research Assessment reports.

2. Click View to download the selected Research Assessment report as a MS Word document.
6.16 Create Summary Report

This functionality is NOT accessible to all PMTS users. The user must have Administrative permissions to access this link.

1. Select a project. The list includes all research projects no matter the project status.
2. Enter comments.
3. Select an Implementation Status Code from the drop-down list.
4. Fill out the optional section. See section 6.17 for instructions.
5. Click Submit to save the information to the database. This will redirect the user so they will no longer be able to enter information. See section 6.18.3 to edit a Summary report.

6.17 High Value Research Designation

1. Complete Section 6.16 to create a Summary Report.
2. Check the box next to Submitted as High Value Research.
3. Choose a date that the project was submitted.
4. Enter any feedback, accolades or additional information into the comments area.
5. Click Submit to save the information to the database.
6.18 View Summary Report
This functionality is accessible to all PMTS users. Edit function is restricted to Administrative permissions.

6.18.1 Search Summary Report
1. Fill out any combination of the choices. No choices will result in a list of all projects in the database.
   - User may select one or more project type.
2. Click the Search button.
Click on the **Click here to Download all Selected Implementation Reports at once** link to download one MS Word file with all the Summary reports listed (all pages).

Click on the **Export to Excel** link to download an MS Excel file of all the projects (all pages).

**NOTE:** There may be multiple pages in the list. Use the page numbers below the list to navigate the remainder of the list.

Click **Select** to be redirected to the Summary Report details page. See Section 6.17.2 for instructions.

Click on **Edit** link to be redirected to Create Summary Report page in Edit mode (Administrative permissions required). See Section 6.18.3 for instructions.

Click on **View** to download the selected Summary Report as a MS Word document.

### 6.18.2 View Summary Report

1. Complete section 6.18.1 to get a list of Summary Reports.
2. Click **Select** to be redirected to the Summary Report Details page.
6.18.3 Edit Summary Report

1. Complete section 6.18.1 to get a list of Summary Reports.
2. Click Edit to be redirected to the Create Summary Report page in Edit mode.

Modify Implementation Status Report

**Project Details**

- **Research Project Number:** 14-5SS
- **SIO/State Project Number:** DOTLT1000018
- **LTRC Project Management and Tracking System Upgrade

**Project Title:**

**Implementation Status Code:** [Dropdown]

**Comment:**

The objective of this research is to update and complete the existing LTRC Project Management and Tracking System. The existing system originally was developed with an in-house staff programmer. Features and applications in the system were continually being added and implemented as time and work priority allowed. This project will complete the implementation of the current applications, add additional features to increase user reliability and help screens between test the system, and provide one year of maintenance for system review and troubleshooting implementation.

**Optional Section: High Value Research Designation Information**

- **Submitted as High Value Research:** [Checkbox]
- **Date Submitted to AASHTO:** [Field]

**Feedback Received or Additional Comment:** [TextArea]

Submit button will redirect the user so they will no longer be able to enter information. Repeat steps 1-4 if additional information needs to be added or edited.

6.18.4 Edit High Value Research Designation

1. Complete Section 6.18.3 to edit a Summary Report.
2. Check or uncheck the box next to Submitted as High Value Research.
3. Choose a date that the project was submitted to AASHTO.
4. Enter any feedback, accolades or additional information into the comments area.
5. Click Submit to save the information to the database.
6.18.5 Download Summary Report

1. Complete section 6.18.1 to get a list of Summary Reports.

2. Click View to download the selected Summary Report as a MS Word document.
**6.19 Create TA Project**

All users DO NOT have access to this page. The user must have PM role or higher permissions to access this page.

1. Enter information into the project fields or select the choices. Project Type is a required field.
2. Click Submit button.
   The project will be automatically numbered based on the current fiscal year and the project type.
   The user is redirected to the TA Project Details page where the TA Project number is displayed.
6.20 View TA projects

All users DO NOT have access to this page. The user must have PM role or higher permissions to access this page.

6.20.1 Search TA Project

1. Fill out any combination of the choices. No choices will result in a list of all TA projects in the database.

   - User may select one or more project type.

2. Click the Search button.
Click on the **Export to Excel** link to download an MS Excel file of all the TA Projects (all pages).

NOTE: There may be multiple pages in the list. Use the page numbers below the list to navigate the remainder of the list.

Click **Select** to be redirected to the TA Project details page. See Section 6.19.2 for instructions.

Click on **Edit** link to be redirected to Create TA Project page in Edit mode. See Section 6.19.3 for instructions.

### 6.20.2 View TA Project

1. Complete section 6.20.1 to get a list of TA Projects.
2. Click **Select** to be redirected to the TA Project Details page.
3. Click Edit Project to be redirected to the Create TA Project page in Edit mode. See Section 6.20.3 for instructions.

6.20.3 Edit TA Project
1. Complete section 6.20.1 to get a list of Summary Reports.
2. Click Edit to be redirected to the Create TA Project page in Edit mode.
3. Enter information into the project fields or select from the drop down fields. Project Type is a required field.

4. Click Submit button.

The user is redirected to the TA Project Details page. Submit button will redirect the user so they will no longer be able to enter information. Repeat steps 1-4 if additional information needs to be added or edited.
7 Performance Measures

ACCESS NOTE: All users DO NOT have access to this main tab page. The user must be designated as an LTRC employee.

7.1 Email Survey to PRC

1. Fill out any combination of the choices. No choices will result in a list of all projects.
   - User may select more than 1 project status.
   - User may select more than 1 project type.

2. Click the Search button.
3. Click on the Export to Excel link (link below list) to download an Excel file of all the projects listed (all pages).

NOTE: There may be multiple pages in the list. Use the page numbers below the list to navigate the remainder of the list.
4. View Project Details
   Click on **Select** to be redirected to Project Details page.
   Problem Statement Details page also has a Download File button.

5. Email Survey to PRC
   Click on **Send Email** button to send an email with the project survey link to the user
   logged into PMTS. The email will contain the email address of all PRC members so
   that the user can check before sending to all PRC members.
7.2 PRC Survey Results

1. Fill out any combination of the choices. No choices will result in a list of all projects.
   - User may select more than 1 project type.

2. Click the View Report button.
3. A Report Viewer appears with overview and summary information for all projects searched.

Use the scroll bar to see other columns.
Use arrows to navigate multiple pages (if applicable).
Use disk icon to export the list (all pages) in PDF, Excel or Word format.
4. Click on the Research Project Number to be redirected to the Survey Comments page that lists all information for that project’s survey results.
Use the scroll bar to see other columns.
Use **arrows** to navigate multiple pages (if applicable).
Use **disk icon** to export the list (all pages) in PDF, Excel or Word format.

---

**Survey Comment and Individual Ratings Sub Report**

<table>
<thead>
<tr>
<th>RESEARCH PROJECT NUMBER</th>
<th>10-307</th>
</tr>
</thead>
<tbody>
<tr>
<td>STATE PROJECT NUMBER</td>
<td>300000099</td>
</tr>
<tr>
<td>PROJECT TITLE</td>
<td>Design Values of Resilient Modulus of Stabilized and Non-stabilized Base</td>
</tr>
<tr>
<td>END DATE</td>
<td>12/30/2013</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>NAME</th>
<th>RESEARCH PROJECT NUMBER</th>
<th>Q1</th>
<th>Q2</th>
<th>Q3</th>
<th>Q4</th>
<th>Q5</th>
<th>Q6</th>
<th>Q7</th>
<th>Q8</th>
<th>Q9</th>
<th>COMMENT1</th>
<th>COMMENT2</th>
<th>IMPROVEMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mark Chenoweth</td>
<td>10-307</td>
<td>5</td>
<td>3</td>
<td>5</td>
<td>3</td>
<td>3</td>
<td>5</td>
<td>3</td>
<td>3</td>
<td>5</td>
<td>2,4,5,7,8,11 haven't seen the Final Report yet.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jeffery Lambert</td>
<td>10-207</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Use the scroll bar to see other columns.
Use **arrows** to navigate multiple pages (if applicable).
Use **disk icon** to export the list (all pages) in PDF, Excel or Word format.
7.3 Fiscal Year Budget

This report gives the budget details for this fiscal year of the project(s) searched.

1. Select a Fiscal year. This is **REQUIRED** for all the budget details to populate to the report.
2. Fill out any other combination of the choices. No choices will result in a list of all projects and the budget date will be INCORRECT.
   - User may select more than 1 project type.
3. Click the View Report button.

Use the scroll bars to see other rows/columns.
Use arrows to navigate multiple pages (if applicable).
Use disk icon to export the list (all pages) in PDF, Excel or Word format.
The "as of" date is the date budget data was last downloaded from the state la.gov system. There will always be lag time from when actual expenses are submitted and when this report reflects them.

7.4 Performance Goals

**NOTE: TO BE IMPLEMENTED**
8 Research Administration

ACCESS NOTE: All users DO NOT have access to this main tab page. The user must have Administrative permissions.
8.1 Create Problem Statement

1. Fill in all fields.
   a. All fields are **required**. The system will alert the user if data needs to be entered or is in the incorrect format.
   b. Submitted by information is automatically pulled from the user’s login information.
2. Click Submit button.
   **only click once or multiple records will be created in the database**
a. The system will automatically email LTRC staff that this problem statement has been created.

b. The submitter will also receive an acknowledgement email.

c. The user will be redirected to the Problem State Details webpage with all the information shown after it was saved to the database.

3. Click on Download File to get a MS Word document of the problem statement details.
8.2 View Problem Statement

8.2.1 Search problem statements

1. Fill out any combination of the choices explained below. No choices will result in a list of all problem statements ever received.
   - Select a year.
   - Type a title, number or date range.
   - Select the person who submitted the problem statement.
2. Click the Search button.

Click on the Export to Excel link (link below list) to download an Excel file of all the problem statements (all pages).
Click Here to Download All link to download a PDF file of all problem statements returned from the search (all pages).
Forward List to Submitters will get the submitter emails for all the problems statements listed (all pages). The user will receive an email to look over before forwarding to all submitters listed at the bottom of the email.

NOTE: There may be multiple pages in the list. Use the page numbers below the list to navigate the remainder of the list.
8.2.2 View Problem Statement Details
1. Complete Section 8.2.1 to get a list of problem statements.
2. Select the Problem Statement number to be redirected to Problem Statement Details page.
   Problem Statement Details page also has a Download File button.

8.2.3 Download Problem Statement
1. Complete Section 8.2.1 to get a list of problem statements.
2. Click on View link to get an MS Word document of the problem statement details.

8.2.4 Edit Problem Statement
1. Complete Section 8.2.1 to get a list of problem statements.
2. Click on Edit link to be redirected to Create Problem Statement page in Edit mode (Administrative permissions required).
1. Type any changes.
2. Click Submit button.
8.3 RPIC-Manage Committee

8.3.1 Create New RPIC Committee

1. Select a year.
2. Click New Committee button.
3. Fill in the information in the panel that appears to enter Committee name and Description.
4. Click Create Committee button.
   The user will see a panel with the information for the committee.

****Follow Edit RPIC Committee section below on how to use these buttons.
8.3.2 Search RPIC Committee

1. Select a year.
2. Select a Committee Name for that year.
3. Click Search button.
   A panel appears with the information for the committee.

****See Section 8.3.3 on how to use these buttons.

Research Problem Identification Committee

Search Committee using the following:

Select Year: 2013
Committee Name: Pavements

Search New Committee

Committee Members

Year: 2013
Committee Name: Pavements

Committee Description:

Edit Committee Edit Membership Cancel Send Meeting Request

Export List to Excel

<table>
<thead>
<tr>
<th>Member Name</th>
<th>Member Affiliation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mr. Larry Sharp</td>
<td>DOTD</td>
</tr>
<tr>
<td>Dr. Mohammad Jamal Khattak</td>
<td>ULL</td>
</tr>
<tr>
<td>Mr. Mark Martinez</td>
<td>LTRC</td>
</tr>
<tr>
<td>Dr. Zhongjie 'Doc' Zhang (LTRC Facilitator)</td>
<td>LTRC</td>
</tr>
<tr>
<td>Dr. Mostafa Elseifi</td>
<td>LSU</td>
</tr>
<tr>
<td>Mr. Don Weathers</td>
<td>LAPA</td>
</tr>
<tr>
<td>Mr. Hector Santiago</td>
<td>FHWA</td>
</tr>
<tr>
<td>Mr. Rod Banks</td>
<td>EBR Department of Public Works</td>
</tr>
<tr>
<td>Ms. Simone Ardoin (Chair)</td>
<td>DOTD</td>
</tr>
<tr>
<td>Mr. Said Ismail</td>
<td>DOTD</td>
</tr>
</tbody>
</table>
8.3.3 **Edit RPIC Committee**

1. Complete Section 8.3.1 to get this panel.

**Committee Members**

- **Year:** 2013
- **Committee Name:** Pavements
- **Committee Description:**

<table>
<thead>
<tr>
<th>Member Name</th>
<th>Member Affiliation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mr. Larry Sharp</td>
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</tr>
<tr>
<td>Mr. Said Ismail</td>
<td>DOTD</td>
</tr>
</tbody>
</table>

2. Click Edit Committee

This **panel** appears.

3. Edit the year, name or description of the committee.

4. Click Save Committee Details
8.3.4 Add Member to RPIC Committee

1. Complete Section 8.3.2 to get this panel.

   **Committee Members**

   Year: 2013
   Committee Name: Pavements
   Committee Description:

   ![Edit Committee button](image1)
   ![Edit Membership button](image2)
   ![Cancel button](image3)
   ![Send Meeting Request button](image4)

   Export List to Excel

<table>
<thead>
<tr>
<th>Member Name</th>
<th>Member Affiliation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mr. Larry Sharp</td>
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<td>LSU</td>
</tr>
<tr>
<td>Mr. Don Weather</td>
<td>LAPA</td>
</tr>
<tr>
<td>Mr. Hector Santiago</td>
<td>FHWA</td>
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<tr>
<td>Mr. Rod Banks</td>
<td>EBR Department of Public Works</td>
</tr>
<tr>
<td>Ms. Simone Ardoin (Chair)</td>
<td>DOTD</td>
</tr>
<tr>
<td>Mr. Said Ismail</td>
<td>DOTD</td>
</tr>
</tbody>
</table>

2. Click Edit Membership button.
The following panel appears.
3. Select Member from the list.
   **Note:** Use Add New PMTS User if the member is not listed. This redirects the user to the System Administration, AddUser function. If this is chosen, the user will have to manually select the Manage Committee link again to continue Editing RPIC membership.

4. If applicable, select Committee Chair or LTRC Facilitator.

5. Click Add Member.
8.3.5 Remove Member from RPIC Committee

1. Complete Section 8.3.2 to get this panel.

2. Click Edit Membership button. The following panel appears.

3. Click Remove Member
The list will change to no longer include this member.
8.3.6 Send Meeting Request to RPIC Committee

1. Either Search RPIC Committee or Create New RPIC Committee to get this panel.

Committee Members

<table>
<thead>
<tr>
<th>Year: 2013</th>
<th>Committee Name: Pavements</th>
</tr>
</thead>
<tbody>
<tr>
<td>Committee Description:</td>
<td></td>
</tr>
</tbody>
</table>

| Edit Committee | Edit Membership | Cancel | Send Meeting Request |

Export List to Excel

<table>
<thead>
<tr>
<th>Member Name</th>
<th>Member Affiliation</th>
</tr>
</thead>
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<td>Mr. Rod Banks</td>
<td>EBR Department of Public Works</td>
</tr>
<tr>
<td>Ms. Simone Ardoin (Chair)</td>
<td>DOTD</td>
</tr>
<tr>
<td>Mr. Said Ismail</td>
<td>DOTD</td>
</tr>
</tbody>
</table>

Page 1 of 2
1 2

2. Click Send Meeting Request button.
The Section 19 Administrative Manager will receive an email to look over before forwarding to all RPIC committee members listed at the bottom of the email.
8.4 RPIC-Assign Problem Statements

8.4.1 Search Problem Statements

1. Select search parameters.

**NOTE:** Selecting no search parameters will return zero results.

2. Export List to Excel (link below list) will export returned problem statement (all pages) into an MS Excel file.
8.4.2  View Problem Statement Details

1. Complete section 8.4.1 to get results.
2. Click the Problem Statement number link to be redirected to the Problem Statement Details page.
### Problem Statement Details

- **Problem Statement Number:** 13505
- **Date Received:** 10/3/2012 2:20:20 PM
- **Submitter:** Dr. Tyson Rupnow
- **Status:** External Problem Statement

#### Investigation into the feasibility of continuously reinforced concrete pavement (CRCP) reinforced with fibers instead of steel rebar

#### Problem Statement Information

In traditional jointed plain concrete pavement (JPCP), the joint is where the majority of problems first arise with faulting and spalling, and joint sealant failure leading to increased IRI and a deteriorated pavement structure. Common fixes for this include partial and full depth repair of the joints as well as concrete and asphalt overlays. Other remediation may include DRR and diamond grinding to improve load transfer and improve ride quality. CRCP has a distinct advantage over JPCP in that it allows the use of fibers as reinforcement.

#### Research Proposed:

This project will investigate the feasibility of Portland cement concrete produced with structural fibers for placement and performance as a continuously fiber reinforced concrete pavement (CFRCP) system. A laboratory study will be undertaken to determine the fresh and hardened characteristics of the CFRCP material. An effort will be made to include fatigue characteristics as well in the laboratory setting. Once verified in a laboratory setting, a full scale test section will be developed at the LRRC pavement research facility.

#### Potential Implementation and Benefits

The potential implementation benefits of this technology are great. A CRCP produced with fibers creating a CFRCP would enable a great reduction in the construction costs of a CRCP type of pavement structure leading to increased life of Louisiana Highway Infrastructure. A cost benefit analysis will be undertaken to compare the cost of each pavement type and will include a CRCP, JPCP, and the newly proposed CFRCP to determine the economic feasibility of each scenario.

### Submitter Information

- **Name:** Dr. Tyson Rupnow
- **Affiliation:** LRRC
- **Tel:** 225-767-9149
- **E-mail:** tyson.rupnow@la.gov

---

3. Click **Download File** button to export the problem statement to a MS Word file.

### 8.4.3 Duplicate Problem Statement for Current RPIC

1. Complete section 8.4.2.
2. Click **Duplicate this for Current RPIC** button.
8.4.4 Assign RPIC Committee to Problem Statement

1. Complete section 8.4.1 to get problem statement list.

**Assign Committees**

- **Search Problem Statements using any of the following:**
  - Select RPIC Year:
  - Select Problem Statement:
    - 13-005 - Investigation into the feasibility of continuously reinforced concr.
  - Select Submitter:
  - Data Received Range (mm/dd/yyyy):
    - From:
    - To:

- **All Problem Statements**

<table>
<thead>
<tr>
<th>Select</th>
<th>Problem Statement No.</th>
<th>Date Received</th>
<th>Title</th>
<th>Committees Assigned</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>13-005</td>
<td>10-03-2012</td>
<td>Investigation into the feasibility of continuously reinforced concrete pavement (CRCP) reinforced with fibers instead of steel rebar</td>
<td>Concrete Materials; Pavements</td>
</tr>
</tbody>
</table>

- Export List to Excel

2. Click on **Assign**

The Assign Committees panel will appear.

**Assign Committees**

- Problem Statement selected: **17-003**
- Select Committee Year: **2017**
- Select Committee Name: **Select**

Committees Assigned

<table>
<thead>
<tr>
<th>Committee Name</th>
<th>Remove Committee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Geotechnical</td>
<td>Remove</td>
</tr>
</tbody>
</table>
If this problem statement is already assigned to committee(s), the user will see those listed.

3. Select Year.
4. Select Name.
5. Click Assign Committee button.
6. Assign this problem statement to additional committees (if applicable) by repeating steps 3-5.
7. Click Done when finished to have the panel disappear. The list of problem statements above will not refresh with the changes until you click Done.

8.4.5 Unassign a Problem Statement from RPIC Committee
1. Complete section 8.4.1 to get problem statement list.

2. Click on Assign.
The Assign Committees panel will appear.

### Assign Committees

<table>
<thead>
<tr>
<th>Problem Statement selected:</th>
<th>17-003</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select Committee Year:</td>
<td>2017</td>
</tr>
<tr>
<td>Select Committee Name:</td>
<td>Select</td>
</tr>
<tr>
<td></td>
<td>Assign Committee</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Committee Name</th>
<th>Remove Committee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Geotechnical</td>
<td>Remove</td>
</tr>
</tbody>
</table>

3. Click **Remove** to unassign this problem statement from the RPIC committee listed to the left.

4. Click **Done** when finished to have the panel disappear. The list of problem statements above will not refresh with the changes until you click **Done**.
8.5 Ratings/Assign to RAC

8.5.1 Search Problem Statement RPIC Rankings

1. Select a Year.
2. Select a Committee.
3. Click Search button.
   a. If it is before a RPIC meeting cycle, the problem statements will appear lowest to highest number order. They will not have Ratings assigned and all should say Assign to RAC in gray. Assign Ratings is also available.
   b. Once Assign Ratings button has been used on at least one problem statement, the sorting changes to highest rank to lowest rank and then by problem statement number lowest to highest.
   c. Once a problem statement has a rating assigned and Assign to RAC function has been used, the text will turn red and show "Assigned to RAC".
### Problem Statement Ratings

#### Search Problem Statements using Committee Names:
- **Select Year:** 2013
- **Select Committee Name:** Pavements

#### Problem Statements Assigned

<table>
<thead>
<tr>
<th>Problem Statement No.</th>
<th>Title</th>
<th>RPIC Ratings</th>
<th>Assign to RAC</th>
<th>Comments</th>
<th>Assign Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>13-065</td>
<td>Investigation of PCC pavement rubblization over weak subgrades</td>
<td>17.57</td>
<td>Assigned to RAC</td>
<td>combine with 076</td>
<td>NA</td>
</tr>
<tr>
<td>13-076</td>
<td>Modification to the existing rubblization specification. The new approach is to allow a Mechanical hammer substitute.</td>
<td>17.57</td>
<td>Assigned to RAC</td>
<td>combine with 065</td>
<td>Assign Rating</td>
</tr>
<tr>
<td>13-057</td>
<td>Evaluation Non-destructive Quality Control Tools for Joint Construction in Jointed Concrete Pavements</td>
<td>14.29</td>
<td>Assigned to RAC</td>
<td>NA</td>
<td></td>
</tr>
<tr>
<td>13-033</td>
<td>Mitigating Damage of Shale Gas Exploration and Mining Efforts</td>
<td>12</td>
<td>Assigned to RAC</td>
<td>NA</td>
<td></td>
</tr>
<tr>
<td>13-005</td>
<td>Investigation into the feasibility of continuously reinforced concrete pavement (CRCP) reinforced with fibers instead of steel rebar</td>
<td>11</td>
<td>Assigned to RAC</td>
<td>NA</td>
<td></td>
</tr>
<tr>
<td>13-045</td>
<td>Synthesis of the Do's and the Don'ts for Concrete IRI</td>
<td>10.36</td>
<td>Assigned to RAC</td>
<td>Assign Rating</td>
<td></td>
</tr>
<tr>
<td>13-014</td>
<td>Comparison of Granulated vs. Hydrated Lime for Treatment of In-Situ Soils</td>
<td>10.07</td>
<td>Assigned to RAC</td>
<td>NA</td>
<td></td>
</tr>
<tr>
<td>13-039</td>
<td>THEORETICAL EVALUATION OF PAVEMENT DAMAGE AND COST DUE TO INCREASED TRUCK VOLUME</td>
<td>8.8</td>
<td>Assign to RAC</td>
<td>Assign Rating</td>
<td></td>
</tr>
<tr>
<td>13-040</td>
<td>Estimating Service Life of In-Situ Pavements in Louisiana Using Pavement Management System Data</td>
<td>8.13</td>
<td>Assign to RAC</td>
<td>Assign Rating</td>
<td></td>
</tr>
</tbody>
</table>

---

**NOTE:** There may be multiple pages in the list. Use the page numbers below the list to navigate the remainder of the list.
8.5.2 Export Individual Rating Sheet

1. Complete section 8.5.1 to get the problem statements assigned to this RPIC Committee for the year chosen.
2. Click Export Individual Rating Sheet link to download and MS Excel file that lists each problem statement assigned to the RPIC Committee chosen for that year chosen. The worksheet has specific questions and ranking criteria. Each committee member is given one of these at the prioritization meeting(s).

8.5.3 Export Final Rating Sheet

1. Complete section 8.5.1 to get the problem statements assigned to this RPIC Committee for the year chosen.
2. Click Export Final Rating Sheet link to download and MS Excel file that is a matrix of each problem statement assigned to the RPIC Committee chosen for that year chosen and each committee member. The LTRC facilitator fills out this worksheet during the meeting(s).
## 8.5.4 Enter Problem Statement RPIC Rankings

### Problem Statements Assigned

<table>
<thead>
<tr>
<th>Problem Statement No.</th>
<th>Title</th>
<th>RPIC Ratings</th>
<th>Assign to RAC</th>
<th>Comments</th>
<th>Assign Ratings</th>
</tr>
</thead>
<tbody>
<tr>
<td>13-065</td>
<td>Investigation of PCC pavement rubblization over weak subgrades</td>
<td>17.57</td>
<td>Assigned to RAC</td>
<td>combine with 076</td>
<td>NA</td>
</tr>
<tr>
<td>13-076</td>
<td>Modification to the existing rubblization specification. The new approach is to allow a Mechanical hammer substitute.</td>
<td>17.57</td>
<td>Assigned to RAC</td>
<td>combine with 065</td>
<td>Assign Rating</td>
</tr>
<tr>
<td>13-057</td>
<td>Evaluation Non-destructive Quality Control Tools for Joint Construction in Jointed Concrete Pavements</td>
<td>14.29</td>
<td>Assigned to RAC</td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td>13-033</td>
<td>Mitigating Damage of Shale Gas Exploration and Mining Efforts</td>
<td>12</td>
<td>Assigned to RAC</td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td>13-005</td>
<td>Investigation into the feasibility of continuously reinforced concrete pavement (CRCP) reinforced with fibers instead of steel rebar</td>
<td>11</td>
<td>Assigned to RAC</td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td>13-045</td>
<td>Synthesis of the Do's and the Don'ts for Concrete IRI</td>
<td>10.36</td>
<td>Assign to RAC</td>
<td>NA</td>
<td>NA</td>
</tr>
</tbody>
</table>

1. Complete section 8.5.1 to get the problem statements assigned to this RPIC Committee for the year chosen.
2. Click **Assign Rating** for the problem statement row desired.
   a. Type in the **RPIC Rating** determined on the Final Rating Sheet.
   b. Type in **Comments** from the Final Rating Sheet (if applicable).
   c. Click **Update** to save the changes to the database. Click **Cancel** to exit out with a rating or comments saved.
   The row will now include the ranking and comments. (See problem statement 13-076 row). The **Assign Rating** link is still available to edit the rating.

### 8.5.5 Assign Problem Statements to RAC

1. Complete section 8.5.1 to get the problem statements assigned to this RPIC Committee for the year chosen.
2. Complete Section 8.5.4 to assign a rating to an individual problem statement.
3. Click **Assign to RAC** for the problem statement row desired.
   The Assign to RAC column will now read **Assigned to RAC** and the Assign Ratings link will be disabled and will instead read **N/A**.
8.5.6 View Problem Statement Details

NOTE: There may be multiple pages in the list. Use the page numbers below the list to navigate the remainder of the list.

1. Complete section 8.5.1 to get the problem statements assigned to this RPIC Committee for the year chosen.
2. Click the Problem Statement number.
   The user will be redirected to the Problem Statement Details page.
3. Click **Download File** button to export the problem statement to a MS Word file.

### 8.5.7 Duplicate Problem Statement for Current RPIC

1. Complete section 8.5.1 to get the problem statements assigned to this RPIC Committee for the year chosen.
2. Complete section 8.5.6 to select a problem statement and view details.
3. Click **Duplicate this for Current RPIC** button.
8.5.8 Export Problem Statements Assigned to RPIC Committee

1. Complete section 8.5.1 to get the problem statements assigned to this RPIC Committee for the year chosen.
2. Click Export List to Excel to download an MS Excel file of all problem statements (all pages in list) assigned this RPIC Committee for the year chosen.
8.6 RPIC-Assigned Problem Statements

8.6.1 Search Problem Statements Assigned to RPIC Committee

1. Select a year.
2. Select a committee.
3. Click Search Problem Statements button.

The results panel appears with results sorted by highest rank to lowest rank (if those have been entered) and then by problem statement number low to high.

NOTE: There may be multiple pages in the list. Use the page numbers below the list to navigate the remainder of the list.

4. Click on View link to download an MS Word file the problem statement.

8.6.2 Download All Problem Statements Assigned to RPIC Committee

1. Complete section 8.6.1 to get the problem statements assigned to an RPIC Committee.
2. Click Here to Download All link to download a PDF file of all problem statements in detail form assigned to that committee for the year chosen.

8.6.3 Forward Assigned Problem Statement to RPIC Committee Members

1. Complete section 8.6.1 to get the problem statements assigned to an RPIC Committee.
2. Click Forward list to RPIC. The user will receive an email to look over before forwarding to all RPIC committee members listed at the bottom of the email.
8.6.4 Search Committee Members Assigned to RPIC Committee

1. Select a year.
2. Select a committee.
3. Click Search Committee Members button.

NOTE: There may be multiple pages in the list. Use the page numbers below the list to navigate the remainder of the list.
8.7 RAC- Manage Committee

8.7.1 Create New RAC Committee
1. Select a year.
2. Click New Committee button.
3. Fill in the information in the panel that appears to enter Committee name and Description.
4. Click Create Committee button.
The user will see a panel with the information for the committee.

****Follow 8.7.3 Edit RAC Committee section below on using these buttons.

8.7.2 Search RAC Committee
1. Select a year.
2. Select a Committee Name for that year.
3. Click Search button.
A panel appears with the information for the committee.
See Section 8.7.3 about using these buttons.

8.7.3 Edit RAC Committee

1. Complete section 8.7.2 to get the committee members and edit buttons.
2. Click Edit Committee Details button.
This panel appears.

**Research Advisory Committee**

3. Edit the year, name or description of the committee.
4. Click Save Committee Details.

8.7.4 Add Member to RAC Committee
1. Complete section 8.7.2 to get the committee members and edit buttons.
2. Click Edit Membership button.
The following panel appears.

3. Select Member from the list.
   **Note:** Use Add New PMTS User if the member is not listed. This redirects the user to the System Administration, AddUser function. If this is chosen, the user will have to manually select the Manage Committee link again to continue Editing RAC membership.
4. If applicable, select Committee Chair or LTRC Facilitator.
5. Click Add Member.
8.7.5 Remove Member from RPIC Committee

1. Complete section 8.7.2 to get the committee members and edit buttons.
2. Click Edit Membership button.
   The following panel appears.

3. Click **Remove** Member
   The list will change to no longer include this member.

8.8 RAC- Assigned Problem Statements/Ratings

8.8.1 Search Problem Statements Assigned to RAC Committee
1. Select a year.
2. Click Search button.
The results panel appears with results sorted by highest rank to lowest rank if those have been entered and then by problem statement number lowest to highest.

NOTE: There may be multiple pages in the list. Use the page numbers below the list to navigate the remainder of the list.

8.8.2 Download All Problem Statements Assigned to RPIC Committee
1. Complete section 8.8.1 to get the problem statements assigned to the RAC.
2. Click Here to Download All link to download a PDF file of all problem statements in detail form assigned to the RAC for the year chosen.
3. Click Export List to Excel to download an MS Excel file of all problem statements assigned to the RAC for the year chosen.

8.8.2 Forward Assigned Problem Statement to RAC Members
1. Complete section 8.8.1 to get the problem statements assigned to the RAC.
2. Click Forward list to RAC.

The user will receive an email to look over before forwarding to all RAC members listed at the bottom of the email.
8.8.3 Export Individual Rating Sheet

1. Complete section 8.8.1 to get the problem statements assigned to the RAC.
2. Click Export Individual Rating Sheet link to download and MS Excel file that lists each problem statement assigned to the RAC for that year chosen. The worksheet has specific questions and ranking criteria. Each RAC member is given one of these at prioritization meeting.

8.8.4 Export Final Rating Sheet

1. Complete section 8.8.1 to get the problem statements assigned to the RAC.
2. Click Export Final Rating Sheet link to download and MS Excel file that is a matrix of each problem statement assigned to the RAC for that year chosen and each RAC member. The LTRC facilitator fills out this worksheet during the meeting(s).
8.8.5 Assign RAC Ratings to Problem Statements

1. Complete section 8.8.1 to get the problem statements assigned to the RAC.

2. Click the Assign Rating link (Administrative permissions required) in the row for the problem statement you wish to edit.
3. Enter the number under **RAC Ratings** and type in **Comments** section (if applicable).

4. Click **Update** to overwrite the previous information with what you typed. If update is not chosen, the information will remain as what was there prior to clicking the **Assign Rating** link. Click **Cancel** to revert back to previous information.

### 8.8.6 Remove Problem Statement from RAC Consideration

1. Complete section 8.8.1 to get the problem statements assigned to the RAC.

2. Click the **Remove** link (Administrative permissions required) in the row for the problem statement you wish to delete. Once deleted the problem statement will have to be assigned again through the **Assign to RAC** link in section 8.5.4 if it still should be considered.
8.9 Biannual Budget Report

NOTE: TO BE IMPLEMENTED

8.10 Biannual Graph

NOTE: TO BE IMPLEMENTED

8.11 Biannual Checklist

When clicked a ReportViewer appears with the list of all the projects that should do a Biannual Report for the current period (projects in ongoing, publication past due, or publication pending status). Use section 8.12 to change the current Biannual Report due date.

Use the scroll bar to see other columns.

Use arrows to navigate multiple pages (if applicable).

Use disk icon to export the list (all pages) in PDF, Excel or Word format.
1. Click on the white box.
2. Select a date from the calendar that appears.
3. Click **Set Biannual Period** button.

**NOTE:** The PMTS configuration file will be changed to this date. As a result, any biannual reports submitted with an ending date prior to this will NO LONGER be editable. These are edited using the View Biannual Report link under the Project Management tab.
8.13 UTC Projects Report

When clicked a search box page and ReportViewer window appears. The search to the database is for all projects that have UTC in the project title and have SIO Budget entries for the year defaulted in the fiscal year field.

1. The user may change the fiscal year or any other combination of the choices.
2. Click the View Report button to alter the results. Use the scroll bars to see other rows/columns.
   - Use arrows to navigate multiple pages (if applicable).
   - Use disk icon to export the list (all pages) in PDF, Excel or Word format.
   - The "as of" date is the date budget data was last downloaded from the state la.gov system. There will always be lag time from when actual expenses are submitted and when this report reflects them.
1. Click on the white textbox.
2. Select a date from the calendar that appears.
3. Click **Notify** button.
   
   This will email all PI, PM and GA personnel for projects that would have a Biannual Report due this period (project in ongoing or past due publication status). The date chosen will be entered into the email message and it can differ from the Biannual period ending date.

   The Associate Director of Research is blind cc’d on this email no matter which user pushes the button.
9 Publications

ACCESS NOTE: All users have access to this main tab page. Some Submit links appear only to those users with PM, Editor or Administrative permissions.

This tab is the location to submit publications through PMTS. The system emails the chosen personnel, attaches the document (if chosen) and makes automatic entries into the publication status of the project for that publication type.

The Submit links should be used more than once as the publication moves through the editorial process. These are NOT one time submission links but instead are used for tracking the publication as it moved from initial submission to the final layout and approval.

General information that applies to all Submit links under this tab.

NO FILES ARE SAVED TO THE SERVER HARD DISK. The only digital copy is contained within the email received from the system if the Attach Document checkbox is checked.

Principal Investigators on the project are only allowed to submit to the Project Manager.

If the user is the LTRC Editor, then the Email message comments are added to the publication status automatic entry.

If the Editor is chosen as in the Submit To section, then the Administrative Manager Section 19 is automatically also copied on the email.

Submit link drop down menus contain only those projects in Ongoing, Publication Past Due or Publication Pending status where the user is PI, PM or GA on the project. For Editors and Administrative personnel, all projects in ongoing status are listed.

When the Submit button is used for any publication, automatic status comments are added to the database. The date, submitted to role and person’s name, who submitted and delivery method will reflect what is chosen in each submission. An example of the format is:
Example: 10/7/2015 - Final Report Submitted to Editor (Jenny Gilbert) by Kirk Zeringue. Publication submitted by email and hand delivered.

### 9.1 Submit Technical Summary

1. Select a project from the drop-down list. A Final Report must be submitted for the project to be in this drop down list.
2. Make selections in the Submit To section. Multiple personnel can be chosen.
3. Select email, hand delivery or both as the delivery method to be recorded for publication status.

---

**For PIs:** the only submit choice is Project Manager.

If Editor is chosen, Adm Mgr Sect 19 is automatically selected to be copied.

If no PRC exists, an error message will show and PRC will not be enabled.
4. Click **Choose File** button to attach a document to the email (if **Attach Document** was checked).

5. Enter **Email message comments** (if applicable).

6. Click **Submit** button.

   The email will be sent to those chosen and the user will be copied on the email. Automated comments about the submission will be entered into the database.
9.2 Submit Final Report

1. Select a project from the drop-down list. The project information is populated in the General Information area.
2. Make selections in the Submit To section. Multiple personnel can be chosen.
3. Select email, hand delivery or both as the delivery method to be recorded for publication status.
4. Click Choose File button to attach a document to the email (if Attach Document was checked).
5. Enter Email message comments (if applicable).
6. Click Submit button.

The email will be sent to those chosen and the user will be copied on the email. Automated comments about the submission will be entered into the database.

For PIs: the only submit choice is Project Manager.
If Editor is chosen, Adm Mgr Sect 19 is automatically selected to be copied.
If no PRC exists, an error message will show and PRC will not be enabled.
1. Fill out any combination of the choices. No choices will result in a list of all projects.
   - User may search more than 1 project type.
2. Click the Search button.

   **NOTE:** There may be multiple pages in the list. Use the page numbers below the list to navigate the remainder of the list.

### 9.3.1 Modify the Technical Summary Status Comments
1. Complete 9.3 section to search a project’s Technical Summary.
2. Click the **Track** link.
The user is redirected to the Modify Technical Summary page. Details are shown about the publication activity for the technical summary. Gray boxes CANNOT be edited. If you have the appropriate permissions, then you may edit the dates associated with the publication.

**Modify Technical Summary**

**General Information**

<table>
<thead>
<tr>
<th>Title</th>
<th>LTRC Project Management and Tracking System Upgrade</th>
</tr>
</thead>
<tbody>
<tr>
<td>SIC/State Project Number</td>
<td>DOTLT1000018</td>
</tr>
<tr>
<td>Research Project Number</td>
<td>14-555</td>
</tr>
<tr>
<td>Research Agency</td>
<td>LTRC</td>
</tr>
<tr>
<td>Principal Investigator</td>
<td>test PI</td>
</tr>
</tbody>
</table>

**Review Dates**

<table>
<thead>
<tr>
<th>Final Report</th>
<th>Technical Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submitted by PI</td>
<td>Submitted by PI:</td>
</tr>
<tr>
<td>Submitted by PM to RRO</td>
<td>Approval Date:</td>
</tr>
<tr>
<td>Submitted by PM to Editor</td>
<td>Approval Date:</td>
</tr>
</tbody>
</table>

**Publication Status:**

10/14/2013 - Technical Summary Submitted to Principal Investigator (test PI) by Adele Lee. Publication was hand delivered.

**Add Comments to Publication Status:**

Type in project information only. System will automatically add a date and your login name to the comments.

3. Enter information into the Add Comments to Publication Status area.
   **Note: PMTS automatically tags a date and your login name.**
4. Select an Approval Date (if applicable; permission based).
5. Click the Save button.
   If the save is successful, the user will be redirected to the Technical Summary Details page.
9.3.2 View the Technical Summary Status Comments

1. Complete 9.3 section to search a project’s Technical Summary.

   View Technical Summary

<table>
<thead>
<tr>
<th>Select</th>
<th>Technical Summary Number</th>
<th>Research Project Number</th>
<th>State Project Number</th>
<th>Title</th>
<th>Project Manager</th>
<th>Track</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select</td>
<td>14-5SS</td>
<td>DOTLT 10000 18</td>
<td>LTRC Project Management and Tracking System Upgrade</td>
<td>Zhongjie Zhang</td>
<td>Track</td>
<td></td>
</tr>
<tr>
<td>Select</td>
<td>12-5SS</td>
<td>30000 605</td>
<td>History of Road Design Standards in Louisiana DOTD</td>
<td>Kirk Zeringue</td>
<td>Track</td>
<td></td>
</tr>
<tr>
<td>Select</td>
<td>10-6SS</td>
<td>30000 140</td>
<td>Establishing an Intelligent Transportation Systems (ITS) Lab at LTRC (Phase II)</td>
<td>Kirk Zeringue</td>
<td>Track</td>
<td></td>
</tr>
</tbody>
</table>

2. Click the **Select** link.
   The user is redirected to the Technical Summary Details page.
No edits can be made on this page. It is for information only.

3. Click **Track Technical Summary** to edit the status comments manually. Refer to section 9.3.1 to edit status comments.
9.4 Track Final Report

1. Fill out any combination of the choices. No choices will result in a list of all projects.
   • User may select more than 1 project type.
2. Click the Search button.

NOTE: There may be multiple pages in the list. Use the page numbers below the list to navigate the remainder of the list.

9.4.1 Modify the Final Report Status Comments

1. Complete 9.4 section to search a project’s Technical Summary.
2. Click the Track link.
The user is redirected to the Modify Final Report page. Details are shown about the publication activity for the final report. Gray boxes CANNOT be edited. If you have the appropriate permissions, then you may edit the dates associated with the publication.

**Track Final Report**

### General Information

- **Title:** Testing Protocol for Predicting Pile Behavior within Pre-Bored Soil
- **S&O/State Project Number:** 30001425
- **Project Start Date:** 11/1/2013
- **Research Project Number:** 14-2GT
- **Project End Date:** 10/31/2014
- **Research Agency:** UNO
- **Project Manager:** Zhongjie Zhang
- **Principal Investigator:** Malay Haji

### Review Dates

<table>
<thead>
<tr>
<th>Final Report</th>
<th>Technical Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Final Report Number:</strong> 546</td>
<td><strong>Submitted by PI:</strong> 7/2/2015</td>
</tr>
<tr>
<td><strong>Submitted by PI:</strong> 7/2/2015</td>
<td><strong>Submitted by PM to PRC:</strong> 7/2/2015</td>
</tr>
<tr>
<td><strong>Submitted by PM to Editor:</strong> 7/2/2015</td>
<td><strong>Approval Date:</strong> 7/2/2015</td>
</tr>
<tr>
<td><strong>Approval Date:</strong></td>
<td></td>
</tr>
</tbody>
</table>

### Publication Status:

- 10/13/2015 - Forwarded to Doc (by email) with Tyson’s technical comment along with updated version for PI to address – Jenny Gilbert
- 10/13/2015 - Final Report Submitted to Project Manager, Principal Investigator, Associate Director (Zhongjie Zhang, Malay Haji, Tyson Rupnow, Ph.D., P.E.) by Jenny Gilbert. Publication submitted by email and hand delivered. Editor specific comments: Doc,
- I’m dropping off the revised version to Tyson for approval. Please note the attached version is the latest version.
- 10/14/2015 & 10/15, Final Report forwarded to Doc for approval – Tyson Rupnow

### Add Comments to Publication Status:

Type in project information only. System will automatically add a date and your login name to the comments.

3. Enter information into the Add Comments to Publication Status area. **Note:** PMTS automatically tags a date and your login name.
4. Select an Approval Date (if applicable; permission based).
5. Click the Save button.
   If the save is successful, the user will be redirected to the Final Report Details page.
9.4.2 View the Final Report Status Comments

1. Complete 9.4 section to search a project’s Final Report.

2. Click the Select link.
   The user is redirected to the Final Report Details page.
No edits can be made on this page. It is for information only.

3. Click **Track Final Report** to edit the status comments manually. Refer to section 9.4.1 to edit status comments.
9.5 Submit Project Capsule

1. Select a project from the drop-down list. The project information is populated in the General Information area.
2. Make selections in the Submit To section. Multiple personnel can be chosen.
3. Select email, hand delivery or both as the delivery method to be recorded for publication status.
4. Click Choose File button to attach a document to the email (if Attach Document was checked).
5. Enter Email message comments (if applicable).
6. Click Submit button. The email will be sent to those chosen and the user will be copied on the email. Automated comments about the submission will be entered into the database.

For PIs: the only submit choice is Project Manager.

If Editor is chosen, Adm Mgr Sect 19 is automatically selected to be copied.

If no PRC exists, an error message will show and PRC will not be enabled.
9.6 **Track Project Capsule**

1. Fill out any combination of the choices. No choices will result in a list of all projects.
   - User may select more than 1 project type.
2. Click the Search button.

### Search Project Capsules

Search Project Capsules using any of the following:

**Project Capsule Details**
- Distribution Date (From): 
- Distribution Date (To):

**General Project Details**
- Research Project Number: 
- SIO/State Project Number: 
- Funding Source: Select
- Budget Category: Select
- Actual Start Date (From): 
- Actual Start Date (To): 
- End Date (From): 
- End Date (To): 
- Group Administrator: Select
- Select Project Type: GT P B ST SS C SA PF TIREADM RS LTAPT T Other

**Search**  **Clear All**

### View Project Capsules

<table>
<thead>
<tr>
<th>Select</th>
<th>Research Project Number</th>
<th>State Project Number</th>
<th>Title</th>
<th>Project Manager</th>
<th>End Date</th>
<th>Status</th>
<th>Funding Source</th>
<th>Track</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>14-2ST</td>
<td>30001 661</td>
<td>Development of A Sustainable UHPC Bridge Decks For Movable Bridges Exploring Naturalistic Driving Data for Distracted Driving Measures</td>
<td>Walid Alaywan</td>
<td>7-29-2016</td>
<td>Ongoing</td>
<td>SPR: TT-Fed/TT-Reg</td>
<td>Track</td>
</tr>
</tbody>
</table>

1 2 3 4 5

**NOTE:** There may be multiple pages in the list. Use the page numbers below the list to navigate the remainder of the list.

9.6.1 **Modify the Project Capsule Status Comments**

1. Complete 9.6 section to search a project’s Project Capsule.
2. Click the **Track** link.
   - The user is redirected to the Modify Project Capsule page.
Details are shown about the publication activity for the project capsule. Gray boxes CANNOT be edited. If you have the appropriate permissions, then you may edit the dates associated with the publication.

**Modify Project Capsule**

**General Information**

- Title: Development of A Sustainable UHPC Bridge Decks For Movable Bridge
- Project Number: 30001661
- Project Start Date: 9/1/2015
- Project End Date: 7/29/2016
- Principal Investigator: Fatmir Menkulasi

**Review Dates**

- Distribution Date: [Input]

**Publication Status:**

- 8/15/2015 - Project Capsule Submitted to Group Administrator Kirk - Ms. Bridget LeBlanc

**Add Comments to Publication Status:**

Type in project information only. System will automatically add a date and your login name to the comments.

3. Enter information into the **Add Comments to Publication Status** area.
   **Note:** PMTS automatically tags a date and your login name.

4. Select **Distribution Date** (if applicable; permission based).

5. Click the **Save** button.
   If the save is successful, the user will be redirected to the Project Capsule Details page.
9.6.2 View the Project Capsule Status Comments

1. Complete 9.6 section to search a Project Capsule.

2. Click the Select link.
   The user is redirected to the Project Capsule Details page.
### Project Capsule Details

#### General Information

<table>
<thead>
<tr>
<th>Title</th>
<th>Development of A Sustainable UHPC Bridge Decks For Movable Bridge:</th>
</tr>
</thead>
<tbody>
<tr>
<td>SIO/State Project Number</td>
<td>30001661</td>
</tr>
<tr>
<td>Research Project Number</td>
<td>14-2ST</td>
</tr>
<tr>
<td>Research Agency</td>
<td>LTU</td>
</tr>
<tr>
<td>Principal Investigator</td>
<td>Fatmir Menkulasi</td>
</tr>
<tr>
<td>Project Start Date</td>
<td>9/1/2015</td>
</tr>
<tr>
<td>Project End Date</td>
<td>7/29/2016</td>
</tr>
<tr>
<td>Project Manager</td>
<td>Walid Alaywan</td>
</tr>
</tbody>
</table>

#### Review Dates

Distribution Date:

#### Publication Status:

8/15/2015 - Project Capsule Submitted to Group Administrator Kirk - Ms. Bridget LeBlanc

---

No edits can be made on this page. It is for information only.

3. Click [Track Project Capsule](#) to edit the status comments manually.
4. Refer to section 9.6.1 to edit status comments.
1. Select a project from the drop-down list. The project information is populated in the General Information area.

2. Make selections in the Submit To section. Multiple personnel can be chosen.

3. Select email, hand delivery or both as the delivery method to be recorded for publication status.

4. Click the Choose File button to attach a document to the email (if Attach Document was checked).

5. Enter Email message comments (if applicable).

6. Click Submit button.

The email will be sent to those chosen and the user will be copied on the email. Automated comments about the submission will be entered into the database.
9.8 **Track Research Implementation Update**

1. Fill out any combination of the choices. No choices will result in a list of all projects.
   - User may select more than 1 project type.
2. Click the Search button.

**Search Research Implementation Update**

- **Research Implementation Details**
  - Distribution Date (From): 
  - Distribution Date (To): 

- **General Project Details**
  - Research Project Number: 
  - STP/State Project Number: 
  - Funding Source: 
  - Budget Category: 
  - Actual Start Date (From): 
  - Actual Start Date (To): 
  - End Date (From): 
  - End Date (To): 
  - Project Status: 
  - Project Manager: 
  - Principal Investigator: 
  - Agency: 
  - Group Administrator: 
  - Project Type: 

3. Click the Search button.

**View Research Implementation Update**

<table>
<thead>
<tr>
<th>Select</th>
<th>Research Project Number</th>
<th>State Project Number</th>
<th>Title</th>
<th>Project Manager</th>
<th>End Date</th>
<th>Status</th>
<th>Funding Source</th>
<th>Track</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select</td>
<td>15-3SA</td>
<td>DOTLT 10000 87</td>
<td>Investigating Safety Impacts of Centerline Rumble Strip, Lane Conversion, Roundabout and J-turn Features on Louisiana Highways</td>
<td>Dortha Cummins</td>
<td>Ongoing</td>
<td>SPR: TT-Fed/TT-Reg</td>
<td>Track</td>
<td></td>
</tr>
</tbody>
</table>

[12345]

**NOTE:** There may be multiple pages in the list. Use the page numbers below the list to navigate the remainder of the list.

9.8.1 **Modify the Research Implementation Update Status Comments**

1. Complete 9.8 section to search a project’s Research Implementation Update.
2. Click the **Track** link.
The user is redirected to the Modify Research Implementation Update page. Details are shown about the publication activity for the Research Implementation Update. Gray boxes CANNOT be edited. If you have the appropriate permissions, then you may edit the dates associated with the publication.

3. Enter information into the Add Comments to Publication Status area.
   **Note: PMTS automatically tags a date and your login name.**

4. Select a Distribution Date (if applicable; permission based).

5. Click the Save button.
   If the save is successful, the user will be redirected to the Research Implementation Update Details page.
9.8.2 View the Research Implementation Update Status Comments

1. Complete 9.8 section to search a project’s Research Implementation Update.

2. Click the Select link.
   The user is redirected to the Research Implementation Update Details page.
### Research Implementation Update Details

#### General Information

<table>
<thead>
<tr>
<th>Item</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>LTRC Project Management and Tracking System Upgrade</td>
</tr>
<tr>
<td>SGO/State Project Number</td>
<td>DOTLT1000018</td>
</tr>
<tr>
<td>Research Project Number</td>
<td>14-SSS</td>
</tr>
<tr>
<td>Research Agency</td>
<td>LTRC</td>
</tr>
<tr>
<td>Principal Investigator</td>
<td>test PI</td>
</tr>
<tr>
<td>Project Start Date</td>
<td>11/1/2014</td>
</tr>
<tr>
<td>Project End Date</td>
<td>7/31/2016</td>
</tr>
<tr>
<td>Project Manager</td>
<td>Adele Lee</td>
</tr>
</tbody>
</table>

#### Review Dates

Distribution Date: 

#### Publication Status:

10/15/2015 - Research Implementation Submitted to Principal Investigator (test PI) by Adele Lee. Publication was hand delivered.

---

No edits can be made on this page. It is for information only.

3. Click [Track Research Implementation Update](#) to edit the status comments manually. Refer to section 9.8.1 to edit status comments.
9.9 Submit Technical Assistance

Select a Project using the following:

Research Project Number: 15-18TA-P · New Orleans Submerged Roads

General Information

For PIs: the only submit choice is Project Manager.

If Editor is chosen, Adm Mgr Sect 19 is automatically selected to be copied.

If no PRC exists, an error message will show and PRC will not be enabled.

1. Select a project from the drop-down list.
   The project information is populated in the General Information area.
7. Make selections in the Submit To section. Multiple personnel can be chosen.
8. Select email, hand delivery or both as the delivery method to be recorded for publication status.
9. Click Choose File button to attach a document to the email (if Attach Document was checked).
10. Enter Email message comments (if applicable).
11. Click Submit button.

The email will be sent to those chosen and the user will be copied on the email. Automated comments about the submission will be entered into the database.
1. Fill out any combination of the choices. No choices will result in a list of all projects.
   • User may select more than 1 project type.
2. Click the Search button.

   NOTE: There may be multiple pages in the list. Use the page numbers below the list to navigate the remainder of the list.

9.10.1 Modify the Technical Assistance Status Comments
1. Complete 9.10 section to search a Technical Assistance project report.
2. Click the Track link.
   The user is redirected to the Modify Technical Assistance page.
Details are shown about the publication activity for the technical assistance publication. Gray boxes CANNOT be edited. If you have the appropriate permissions, then you may edit the dates associated with the publication.

3. Enter information into the **Add Comments to Publication Status** area. 
   **Note:** PMTS automatically tags a date and your login name. 
4. Select **any dates** (if applicable; permission based). 
5. Click the **Save** button. 
   If the save is successful, the user will be redirected to the Technical Assistance Details page.
9.10.2 View the Technical Assistance Status Comments

1. Complete 9.10 section to search a Technical Assistance.

**View Technical Assistance Reports**

<table>
<thead>
<tr>
<th>Select</th>
<th>TA Project Number</th>
<th>Title</th>
<th>Project Manager</th>
<th>Completion Date</th>
<th>Deliverable Type</th>
<th>Track</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select</td>
<td>14-02TA-B</td>
<td>Evaluation of Rutting Distresses on I-20 Near Minden, La.</td>
<td>Bill King</td>
<td>12-31-2014</td>
<td>1</td>
<td>Track</td>
</tr>
<tr>
<td>Select</td>
<td>13-01TA-B</td>
<td>Evaluation of Rutting Distresses on I-20 near Mound to Delta Scales</td>
<td>Bill King</td>
<td>3-22-2013</td>
<td>1</td>
<td>Track</td>
</tr>
<tr>
<td>Select</td>
<td>12-04TA-B</td>
<td>US 157 OGFC Forensic Evaluation</td>
<td>Bill King</td>
<td>11-07-2012</td>
<td>2</td>
<td>Track</td>
</tr>
</tbody>
</table>

2. Click the Select link.
   The user is redirected to the Technical Assistance Details page.
### Technical Assistance Details

#### General Information

<table>
<thead>
<tr>
<th>TA Project Number</th>
<th>14-02TA-B</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Title:</strong></td>
<td>Evaluation of Rutting Distresses on I-20 Near Minden, La.</td>
</tr>
<tr>
<td><strong>Principal Investigator:</strong></td>
<td>Bill King</td>
</tr>
<tr>
<td><strong>Project Manager:</strong></td>
<td>Bill King</td>
</tr>
<tr>
<td><strong>Response Date:</strong></td>
<td>12/30/2014</td>
</tr>
<tr>
<td><strong>Requester:</strong></td>
<td>Benjamin Thomas</td>
</tr>
<tr>
<td><strong>Survey Sent Date:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Request Received Date:</strong></td>
<td>11/6/2014</td>
</tr>
<tr>
<td><strong>Completion Date:</strong></td>
<td>12/31/2014</td>
</tr>
<tr>
<td><strong>Deliverable Type:</strong></td>
<td>Report</td>
</tr>
<tr>
<td><strong>Project Type:</strong></td>
<td>Bituminous</td>
</tr>
</tbody>
</table>

#### Review Dates

- Submitted by PI: [Date]
- Submitted by PM to Editor: [Date]
- Approval Date: [Date]

**Publication Status:**

No edits can be made on this page. It is for information only.

3. Click **Track Technical Assistance** to edit the status comments manually.
4. Refer to section 9.10.1 to edit status comments.
9.11 Submit Fact Sheet

1. Select a project from the drop-down list. The project information is populated in the General Information area.
2. Make selections in the Submit To section. Multiple personnel can be chosen.
3. Select email, hand delivery or both as the delivery method to be recorded for publication status.
4. Click Choose File button to attach a document to the email (if Attach Document was checked).
5. Enter Email message comments (if applicable).
6. Click Submit button. The email will be sent to those chosen and the user will be copied on the email. Automated comments about the submission will be entered into the database.

For PIs: the only submit choice is Project Manager.
If Editor is chosen, Adm Mgr Sect 19 is automatically selected to be copied.
If no PRC exists, an error message will show and PRC will not be enabled.
9.12 Track Fact Sheet

1. Fill out any combination of the choices. No choices will result in a list of all projects.
   - User may select more than 1 project type.
2. Click the Search button.

NOTE: There may be multiple pages in the list. Use the page numbers below the list to navigate the remainder of the list.
9.12.1 Modify the Fact Sheet Status Comments
1. Complete 9.12 section to search a project's Fact Sheet.
2. Click the Track link.
   The user is redirected to the Modify Fact Sheet page.
   Details are shown about the publication activity for the project capsule. Gray boxes CANNOT be edited. If you have the appropriate permissions, then you may edit the dates associated with the publication.

Modify Fact Sheet

**Note: PMTS automatically tags a date and your login name.**

3. Enter information into the Add Comments to Publication Status area.
4. Select Distribution Date (if applicable; permission based).
5. Click the Save button.
   If the save is successful, the user will be redirected to the Fact Sheet Details page.
9.12.2 View the Fact Sheet Status Comments

1. Complete 9.12 section to search a Fact Sheet.

### View Fact Sheets

<table>
<thead>
<tr>
<th>Select</th>
<th>Research Project Number</th>
<th>State Project Number</th>
<th>Title</th>
<th>Project Manager</th>
<th>End Date</th>
<th>Status</th>
<th>Funding Source</th>
<th>Track</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select</td>
<td>15-12SS</td>
<td>DOT</td>
<td>test project The Rideability of a Deflected Bridge Approach Slab (LRTC Project 02-2GT Continuation: Phase II)</td>
<td>Kirk Zeringue</td>
<td>2-28-2016</td>
<td>Ongoing</td>
<td>State: TT-Reg</td>
<td>Track</td>
</tr>
<tr>
<td>Select</td>
<td>11-3P</td>
<td>30000 160</td>
<td>Zhongjie Zhang</td>
<td></td>
<td>3-31-2014</td>
<td>Completed</td>
<td>SPR: TT-Fed/TT-Reg</td>
<td>Track</td>
</tr>
</tbody>
</table>

2. Click the Select link.
   The user is redirected to the Fact Sheet Details page.
Fact Sheet Details

General Information

<table>
<thead>
<tr>
<th>Title:</th>
<th>The Rideability of a Deflected Bridge Approach Slab (LTRC Project 0)</th>
</tr>
</thead>
<tbody>
<tr>
<td>SIC/State Project Number:</td>
<td>30000160</td>
</tr>
<tr>
<td>Research Project Number:</td>
<td>11-3P</td>
</tr>
<tr>
<td>Research Agency:</td>
<td>LTRC</td>
</tr>
<tr>
<td>Principal Investigator:</td>
<td>Mark Martinez</td>
</tr>
<tr>
<td>Project Start Date:</td>
<td>4/1/2011</td>
</tr>
<tr>
<td>Project End Date:</td>
<td>3/31/2014</td>
</tr>
<tr>
<td>Project Manager:</td>
<td>Zhongjie Zhang</td>
</tr>
</tbody>
</table>

Review Dates

Distribution Date:

Publication Status:

3/9/2015 - Fact Sheet Submitted to Editor Laura Williams - Mr. Michael D. Boudreaux
3/10/2015 - Fact Sheet edited and returned to PI - Ms. Laura Williams
7/23/2015 - Printed and delivered next door - Ms. Jenny Gilbert

No edits can be made on this page. It is for information only.

3. Click Track Fact Sheet to edit the status comments manually.
4. Refer to section 9.12.1 to edit status comments.
**10 Reports**

ACCESS NOTE: All users DO NOT have access to this page and the links on it. The user must have PM role or higher permissions to access this page.

### 10.1 Project Expenses

This report gives the budget information for expenses charged to the project over the life span of the project(s) searched.

1. Fill out any other combination of the choices. No choices will result in a list of all projects.
   - User may select more than 1 project type.

2. Click the View Report button.

[Project Expenses Search]

Use the scroll bars to see other rows/columns.

Use arrows to navigate multiple pages (if applicable).

Use disk icon to export the list (all pages) in PDF, Excel or Word format.
3. Click the symbol next to the LTRC project number to expand the project expenditures grouped by years.

4. Click the symbol next to the particular fiscal year of interest.
5. Click the symbol next to the particular cost category of interest.
   The total line sums the expenditures for the entire life cycle of the project.
   The "as of" date is the date budget data was last downloaded from the state la.gov system. There will always be lag time from when actual expenses are submitted and when this report reflects them.

10.2 FY Expenditure Report
This report gives the budget details for this fiscal year of the project(s) searched.

3. Select a Fiscal year. This is REQUIRED for all the budget details to populate to the report.
4. Fill out any other combination of the choices. No choices will result in a list of all projects and the budget data will be INCORRECT.
   • User may select more than 1 project type.
5. Click the View Report button.
Use the scroll bars to see other rows/columns.

Use **arrows** to navigate multiple pages (if applicable).

Use **disk icon** to export the list (all pages) in PDF, Excel or Word format.

The "as of" date is the date budget data was last downloaded from the state la.gov system. There will always be lag time from when actual expenses are submitted and when this report reflects them.
10.3 Contract Payables

This report gives the external contract budget expenses for this fiscal year of the project(s) searched.

1. Select a Fiscal year.
2. Fill out any other combination of the choices. No choices will result in a list of all projects.
   - User may select more than 1 project type.
3. Click the View Report button.
Use the scroll bars to see other rows/columns.

Use arrows to navigate multiple pages (if applicable).

Use disk icon to export the list (all pages) in PDF, Excel or Word format.

The "as of" date is the date budget data was last downloaded from the state la.gov system. There will always be lag time from when actual expenses are submitted and when this report reflects them.
10.4 Contract Payables (Details)

This report gives the external contract budget expense details for this fiscal year of the project(s) searched.

1. Select a Fiscal year.
2. Fill out any other combination of the choices. No choices will result in a list of all projects.
   • User may select more than 1 project type.
3. Click the View Report button.

Use the scroll bars to see other rows/columns.
Use arrows to navigate multiple pages (if applicable).
Use disk icon to export the list (all pages) in PDF, Excel or Word format.

The "as of" date is the date budget data was last downloaded from the state la.gov system. There will always be lag time from when actual expenses are submitted and when this report reflects them.
10.5 DOA Budget Report

This report gives the budget expense details over the entire life cycle and this fiscal year of the project(s) searched.

1. Select a Fiscal year.
2. Fill out any other combination of the choices. No choices will result in a list of all projects.
   - User may select more than 1 project type.
3. Click the View Report button.
   Use the scroll bars to see other rows/columns.
   Use arrows to navigate multiple pages (if applicable).
   Use disk icon to export the list (all pages) in PDF, Excel or Word format.

The “as of” date is the date budget data was last downloaded from the state la.gov system. There will always be lag time from when actual expenses are submitted and when this report reflects them.
10.6 Project Report BR 17A

This report gives the external contract budget and expenditure details for this fiscal year of the project(s) searched. Additionally, it groups by funding source and gives a total for that funding source.

1. Select a Fiscal year.
2. Fill out any other combination of the choices. No choices will result in a list of all projects.
   - User may select more than 1 project type.
3. Click the View Report button.

Use the scroll bars to see other rows/columns.
Use arrows to navigate multiple pages (if applicable).
Use disk icon to export the list (all pages) in PDF, Excel or Word format.
The total line sums the expenditures and budget by funding source by fiscal year.
The “as of” date is the date budget data was last downloaded from the state la.gov system. There will always be lag time from when actual expenses are submitted and when this report reflects them.
10.7 FY 2010-2011 Budget
This report gives budget expenditures for the 201-2011 fiscal year. This is separate due to the database structure behind PMTS. It will always produce the exact same numbers.

Use the scroll bars to see other rows/columns.
Use arrows to navigate multiple pages (if applicable).
Use disk icon to export the list (all pages) in PDF, Excel or Word format.

10.8 High Value Research Report
This report list any LTRC projects that were designated as High Value Research. The project is designated in the Create Summary Report/View Summary report links under the Project Management tab (See Section 6.17).

Use the scroll bars to see other rows/columns.
Use arrows to navigate multiple pages (if applicable).
Use disk icon to export the list (all pages) in PDF, Excel or Word format.
10.9 Tech Manager Biannual List

This report lists any LTRC projects that have submitted a Biannual Report for the current period (current biannual period is set in the web.config file). This report shows the date each biannual was last updated as well as the Project Manager comments.

Use the scroll bars to see other rows/columns.
Use arrows to navigate multiple pages (if applicable).
Use disk icon to export the list (all pages) in PDF, Excel or Word format
11 System Administration

ACCESS NOTE: All users DO NOT have access to this page and the links on it. The user must have System Administrative role to access this page.

11.1 Create and Edit Users

PMTS has users and logins. A user is created first then a login account is created from the user. RPIC/PRC/RAC committee members do not need to have a login, but instead can just be a user. Principal Investigators will need a login account to accomplish project management processes.

11.1.1 Search User

1. Fill out any combination of the choices. No choices will result in a list of all users.
2. Click Search.

11.1.2 Create User

1. Complete section 11.1.1 to ensure that the user is not already in the system.
2. Click Create User button.
3. Enter or select all fields in the **User Details** area. First Name, Last Name, Email and Phone are **REQUIRED** fields. PMTS will give an informative error about which fields have not been filled or have the incorrect format.

4. Select a **User Role**. This is the only permission that a user is granted. An external user will generally be assigned the Committee Member role. Internal users should be assigned the LTRC Employee role but should also be given a login account. The permissions assigned to the login account are crucial because they are utilized throughout PMTS (see section 11.3 for instructions).

5. Select an **Agency**. The Agency details will be displayed once an agency is selected.

6. Click **Add User** button.
11.1.3 Edit User

1. Complete section 11.1.1 to get a list of users.
2. Click the Search button.

**Manage Users**

**Search User by User details:**
- **First Name:** test
- **Middle Name:**
- **Last Name:**
- **Phone:**
- **Email:**
- **Search**
- **Clear All**
- **Create User**

**User Details**
- **Prefix:** Ms.
- **First Name:** Test
- **Middle Name:**
- **Last Name:** User
- **Email:** user@email.com
- **Phone:** 225-767-9729
- **Fax:**
- **User Role:** System Administrator
- **Select Agency:** Select

**Agency Details**
- **Agency Name:** LTRC
- **Address 1:** 4101 Gourrier Avenue
- **Address 2:**
- **State:** Louisiana
- **City:** Baton Rouge
- **Zip Code:** 70808
- **Phone:** 225-767-9131
- **Save Change**
- **Clear All**

3. Enter or select all fields that need to be edited.

**CAUTION:** Changing the **user role** here is NOT SUFFICIENT if the user has a login account. See Section 11.4.2 to select role(s) on the login account.

4. Click **Save Change** button.
11.2 Manage Agencies

11.2.1 Search Agency

1. Fill out any combination of the choices. No choices will result in a list of all agencies.
2. Click the Search Agency button.
NOTE: There may be multiple pages in the list. Use the page numbers below the list to navigate the remainder of the list.

Click on the **Edit** link to edit an agency. See section 11.2.3 for instructions.

Click on the **Delete** link to remove an agency from the database. See section 11.2.4 for instructions.

**CAUTION:** Any user or login assigned to this agency will have NULL information if the agency is removed from PMTS.

Click on the **Export to Excel** link to download an MS Excel file of all the agencies (all pages).
11.2.2 Create Agency

Manage Agencies

Please enter the following values to proceed:

- Agency Name
- Address 1
- City
- Zip Code
- Phone Number

**Search or Add New Agency:**

- Agency Name: [Input Field]
- Address 1: [Input Field]
- Address 2: [Input Field]
- State: [Select]
- City: [Input Field]
- Zip Code: [Input Field]
- Phone: [Input Field]

[Search Agency] [Add Agency] [Clear All]

1. Fill out any combination of the choices.
2. Click the **Search Agency** button to verify that the agency does not already exist.
3. Enter any information.
   - The fields listed in red are **REQUIRED**. PMTS will give an informative error about which fields have not been filled or have the incorrect format.
4. Click the **Add Agency** button.
11.2.3 Edit Agency
1. Complete section 11.2.1 to get a list of agencies.
2. Click the **Edit** link.
   The panel will display the details of the agency.

### Manage Agencies

#### Search or Add New Agency:

<table>
<thead>
<tr>
<th>Agency Name:</th>
<th>AARP Louisiana</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address 1:</td>
<td>3502 S. Carrollton Avenue</td>
</tr>
<tr>
<td>Address 2:</td>
<td>Suite C</td>
</tr>
<tr>
<td>State:</td>
<td>Louisiana</td>
</tr>
<tr>
<td>City:</td>
<td>New Orleans</td>
</tr>
<tr>
<td>Zip Code:</td>
<td>70118</td>
</tr>
<tr>
<td>Phone:</td>
<td>999-999-9999</td>
</tr>
<tr>
<td></td>
<td>Search Agency</td>
</tr>
</tbody>
</table>

#### View Searched Agencies

<table>
<thead>
<tr>
<th>Agency Name</th>
<th>Address</th>
<th>Edit</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>AARP Louisiana</td>
<td>3502 S. Carrollton Avenue Suite C New Orleans Louisiana-70118</td>
<td><img src="image" alt="Edit" /></td>
<td><img src="image" alt="Delete" /></td>
</tr>
</tbody>
</table>

3. Edit any field(s).
4. Click **Save Changes** button.

11.2.4 Delete Agency
1. Complete section 11.2.1 to get a list of agencies.
2. Click the **Delete** link.

**CAUTION:** No confirmation message appears and no success message is given after the delete occurs. Once the button is clicked the agency is deleted.

**CAUTION:** Any user or login assigned to this agency will have NULL information if the agency is removed from PMTS.
11.3 Create Login Account
A login account is created from an existing PMTS user.

NOTE: There may be multiple pages in the list. Use the page numbers below the list to navigate the remainder of the list.

1. Fill out any combination of the choices. No choices will result in a list of all users.
2. Click **Select** to be redirected to the login details page.
3. Select additional roles if applicable. Use the Ctrl-key and mouse click to select more than one. The permissions assigned to the login account are crucial because they are utilized throughout PMTS. A login account should generally have more than 1 role.

4. Click the Create Login button.

   The user is sent an email with their login credentials. The LTRC Administrative Assistant and the Associate Director of Research are copied on the email.

   The login account name is the user's email and the initial password for any login is LTRCUSER.
11.4 View Login Account

11.4.1 Search Login Account

1. Fill out any combination of the choices. No choices will result in a list of all login accounts.
2. Click search.

NOTE: There may be multiple pages in the list. Use the page numbers below the list to navigate the remainder of the list.

3. Click Select to be redirected to the login account details page.
11.4.2 Edit Login Account
1. Complete Section 11.4.1 to get a list of login accounts.
2. Click Select to be redirected to the login account details page.
**User Login Details**

**User Details**

- **User Name:** test PI
- **Email:** testPl@la.gov
- **Phone:** 555-555-5555
- **Fax:**

**Agency Details**

- **Agency Name:** LTRC
- **Address 1:** 4101 Gourrier Avenue
- **City:** Baton Rouge
- **State:** Louisiana
- **Zip Code:** 70808
- **Phone:** 225-767-9131

**Login Details**

- **User Name:** testPl@lsu.edu

**User Roles Assigned:**

<table>
<thead>
<tr>
<th>User Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Principal Investigator</td>
</tr>
</tbody>
</table>

3. Click **Edit User Login Details** to be redirected to the Edit Login page.
4. Edit any field in the User Details area.
5. Select any number of roles. Use the Ctrl-key and mouse click to select more than one.
5. Click the Save Login Details.

The save function will only save the edited login detail fields to the user login database table. The user database table will not be modified. This means that drop-down lists throughout PMTS may search the user database table rather than the user login database table. If the login information is edited here, it is best to also modify the user information (see section 11.1.3 for instructions).

The save function will not save any agency information to the agency database table.

It is best NOT to edit these fields but to instead follow the instructions in section 11.2.3.
11.5 Manage Permissions Codes
This link modified the database tables that link the user roles with the permissions assigned to the role.

**THIS LINK SHOULD ONLY BE USED BY THE SYSTEM ADMINISTRATOR.**

11.5.1 View/Edit Permission Assigned to a User Role
1. Select a User Role.
   The list will populate with the permissions assigned to the role.

   **User Roles and Permissions Code Mapping**

   **Permissions Added to the selected User Role:**

<table>
<thead>
<tr>
<th>Permission Code</th>
<th>Selected User Role: Project Manager</th>
<th>Remove Permission</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project_ReadOnly</td>
<td>Remove</td>
<td></td>
</tr>
<tr>
<td>Project_Write</td>
<td>Remove</td>
<td></td>
</tr>
<tr>
<td>PM</td>
<td>Remove</td>
<td></td>
</tr>
</tbody>
</table>

2. Select a Permission to assign to the role.
3. Click Assign Permission.
4. The list will update with the changes.
5. Repeat Steps 1-3 as needed until all permissions are assigned to the role.
11.5.2 Delete Permission Assigned to a User Role

1. Select a User Role.
   The list will populate with the permissions assigned to the role.

User Roles and Permissions Code Mapping

Permissions Added to the selected User Role:

<table>
<thead>
<tr>
<th>Permission Code</th>
<th>Selected User Role</th>
<th>Remove Permission</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project_ReadOnly</td>
<td>Remove</td>
<td></td>
</tr>
<tr>
<td>Project_ReadWrite</td>
<td>Remove</td>
<td></td>
</tr>
</tbody>
</table>

2. Click **Remove** if the permission should not be assigned to that user role.
The list will update with the changes.

**CAUTION:** Any login assigned to this role will be affected by a removal.

11.6 Manage Codes

This link modifies the database tables of all the project related reference codes used throughout PMTS (for example: project type, project status, budget category)

**THIS LINK SHOULD ONLY BE USED BY THE SYSTEM ADMINISTRATOR.**

11.6.1 Create New Code

1. Select a **Code Table**.
2. Enter information into the **Create New Code** section.
3. Click **Create New**.

### 11.6.2 Edit Code

1. Select a Code Table.
2. Click Edit.
   The Edit Code panel appears.

3. Click Edit.
11.6.3 Delete Code

1. Select a Code Table.

2. Click Delete.

**CAUTION:** No confirmation message appears and no success message is given after the delete occurs. Once the button is clicked the code is deleted.

**CAUTION:** Deleting codes within these tables can have negative effects across PMTS because these codes are used as references throughout PMTS program code.
11.7 Manage User Roles

This link modifies the database table that stores all the user roles. Many other database tables look to this table for reference.

**THIS LINK SHOULD ONLY BE USED BY THE SYSTEM ADMINISTRATOR.**

11.7.1 Create User Role

1. Enter a **User Role** name. Make sure it does not already exist in the database.
2. Click **Add User Role**.

**NOTE:** There may be multiple pages in the list. Use the page numbers below the list to navigate the remainder of the list.

Click on the **Export to Excel** link to download an MS Excel file of all the user roles (all pages).
11.7.2 Edit User Role

1. Click **Edit**.
   The list row is placed in edit mode. The Update and Cancel links appear.

2. **Edit** the description.

3. Click **Update**
   - or -
   Click **Cancel** if the change should not be saved.

Manage User Roles

- **Add New User Role:**
  - **Permission Type:** [ ]
  - [ ] Add User Role  [ ] Clear

- **View All User Roles**
  
<table>
<thead>
<tr>
<th>User Role Description</th>
<th>Edit</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrative Manager</td>
<td>Edit</td>
<td>Delete</td>
</tr>
<tr>
<td>Administrative Manager - Section 19</td>
<td>Edit</td>
<td>Delete</td>
</tr>
<tr>
<td>Administrative Manager - Section 19</td>
<td>Update</td>
<td>Cancel</td>
</tr>
<tr>
<td>Associate Director</td>
<td>Edit</td>
<td>Delete</td>
</tr>
<tr>
<td>Committee Chair</td>
<td>Edit</td>
<td>Delete</td>
</tr>
<tr>
<td>Committee Member</td>
<td>Edit</td>
<td>Delete</td>
</tr>
<tr>
<td>Director</td>
<td>Edit</td>
<td>Delete</td>
</tr>
<tr>
<td>Editor</td>
<td>Edit</td>
<td>Delete</td>
</tr>
<tr>
<td>Executive Reviewers</td>
<td>Edit</td>
<td>Delete</td>
</tr>
<tr>
<td>Group Administrator</td>
<td>Edit</td>
<td>Delete</td>
</tr>
</tbody>
</table>
### 11.7.3 Delete User Role

**Manage User Roles**

**Add New User Role:**
- **Permission Type:**

**View All User Roles**

<table>
<thead>
<tr>
<th>User Role Description</th>
<th>Edit</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrative Manager</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Administrative Manager - Section 19</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Administrative Manager - Section 33</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Associate Director</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Committee Chair</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Committee Member</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Director</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Editor</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Executive Reviewers</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Group Administrator</td>
<td></td>
<td>[Delete]</td>
</tr>
</tbody>
</table>

1. Click [Delete].

**CAUTION:** No confirmation message appears and no success message is given after the delete occurs. Once the button is clicked the user role is deleted.

**CAUTION:** Deleting user roles within these tables can have negative effects across PMTS because these roles are used as references throughout PMTS program code.
11.8 Restart MS Office on server

This link runs code that will close any MS Word or MS Excel services running on the Windows server.

**THIS LINK SHOULD ONLY BE USED WHEN THE SYSTEM HAS ISSUES WITH WORD OR EXCEL FILES.**

11.9 Get Email List to Announce

This link retrieves the emails of all projects in proposed, ongoing, publication pending or publication past due status. These are emails related to projects not emails of who is logged onto PMTS.

Click the export buttons to get a list separated with semicolons so it can be added easily to an email program.
11.10 Login History

This link retrieves the history for which users have logged in. Every Sunday, a SQL Server database job clears out all but those over the last 7 days.
12 SQL Server Database Scheduled Jobs

12.1 Import SIO Budget

1. The SQL server scheduled job is named ImportSIOBudget.
2. This job runs every week on Monday and Wednesday at 12:30:00 AM.
3. On Failure: the system emails Tina Kleinpeter.
4. The job steps are shown in the screen shot below.

- Step 1 clears the table SIOBudget_Staging in the Project_Management database.
- Step 2 automatically imports the SIOReport.xls file found in the server directory C:\SIOBudgetData using an SSIS package located at C:\SIOBudgetData\ImportSIOBudget.dtsx.

Tina is responsible for downloading an MS Excel 97-2003 format file from the state’s la.gov system. The file must have a date in cell as shown in the screen shot below. She does this at least monthly but may download a file more frequently during end of the year or other reporting periods. The file is all the budget data for LTRC for the entire fiscal year. SO at end of year months, Tina must know what date to enter so that all that fiscal year’s data is written over.
c. Step 3 executes the stored procedure BUDGET_SIOupdate. This stored procedure deletes all records from the BUDGET_SIO table that have the same fiscal year as calculated from the newly imported data. It then inserts all the budget data into the BUDGET_SIO table.

d. Step 4 adds the LaGov_Date extended property to the Budget_SIO table.

12.2 Project End Date Reminder

1. The SQL server scheduled job is named 3 month before project end reminder.
2. This job runs every day at 4:00:00 AM.
3. On Completion: the system emails the computer analyst.
4. The job steps are shown in the screen shot below.

a. Step 1 runs the NOTIFY_PM_PROJECT_DUE_Search stored procedure in the Project_Management database. This stored procedure copies relevant
project information into the EmailTable. Step 2 uses the EmailTable to send emails.

b. Step 2 sends a separate email to each project's manager based on if the project's end date or revised end date is three months ahead of that day.

12.3 PRC Survey Non-Responder Reminder

1. There are 2 SQL server scheduled jobs named Email PRC Survey non-responders after 2 weeks and Email PRC Survey non-responders after 1 month.
2. This job runs every day at 2:00:00 AM.
3. On Failure: the system emails the computer analyst.
4. The job steps are shown in the screen shot below.

   ![Screen Shot](image)

   a. Step 1 runs the NOTIFY_PRC_Members_Non-survey_Response_Search stored procedure to get the emails of PRC members who have not filled out the survey and therefore are not in the PRC_Survey table for that project_uid. The stored procedure uses the create date stored in the PRC_Survey_year table as the initiation date because it is added once the Email Survey to PRC members button in clicked in PMTS.

   b. Step 2 sends the emails to the non-responsive PRC member and the Project manager for the project. If this is the 2 weeks then the email says second notice and if this is the month job then the email says final notice.

12.4 Proposed Project Cleanup

1. The SQL server scheduled job is named Proposed_project_cleanup.
2. This job runs once a year on March 15th.
3. The job steps are shown in the screen shot below.

   ![Screen Shot](image)

   Step 1 runs code to get all the projects in proposed status that were created over 2 years ago. The system send an email to Bridget LeBlanc (Sect 19 assistant) for her to look over. An example email is shown below.
12.5 Project Management Database (Production) Backup

1. The SQL server scheduled job is named PROJECT_MANAGEMENT_BACKUP.
2. This job runs every day at 12:00:00 AM.
3. On Completion: the system emails the computer analyst.
4. The job steps are shown in the screen shot below.

Step 1 runs a full backup and places the file into the server directory C:\BACKUPS. An example filename is PM_13 Nov 2015 00_00_01_097.bak.

12.6 Project Management Test Database Backup

1. The SQL server scheduled job is named PROJECT_MANAGEMENT_TEST_BACKUP.
2. This job runs weekly on Sunday at 3:00:00 AM.
3. On Failure: the system emails the computer analyst.
4. The job steps are shown in the screen shot below.

Step 1 runs a full backup and places the file into the server directory C:\BACKUPS. An example filename is PM_TEST_15 Nov 2015 03_00_01_097.bak.

12.7 Project Management Test Database Backup

1. The SQL server scheduled job is named PROJECT MGMT EXTERNAL BACKUP.
2. This job runs weekly on Sunday at 2:00:00 AM.
3. On Failure: the system emails the computer analyst.
4. The job steps are shown in the screen shot below.

Step 1 runs a full backup and places the file into the server directory C:\BACKUPS. An example filename is PM_EXTERNAL_15 Nov 2015 02_00_01_097.bak.

12.8 Change Biannual Date Reminder

1. The SQL server scheduled job is named change biannual period reminder.
2. This job runs every 6 months (August 1 and January 1)
3. On Completion: the system emails the computer analyst.
4. The job steps are shown in the screen shot below.

This step emails Tyson Rupnow to remind him to use the Set Biannual Period link in PMTS. See Section 8.12 for more information.
12.9 Login History Delete

1. The SQL server scheduled job is named Delete_Login_History.
2. This job runs weekly on Sunday at 2:00:00 AM.
3. On Failure: the system emails the computer analyst.
4. The job steps are shown in the screen shot below.

Step 1 selects all rows from the LoginHistory table that are older than the day before. It then deletes those records from the table. The LoginHistory table entries are created each time a user logs into PMTS. See Section 11.10 for more information.

13 Appendices

Instructions to maintain this manual.

Edit the main document under the project directory on the development computer, but you will have to automatically copy the entire HelpDocuments folder because visual studio will not include it on deploy.

Different internet browsers will not allow for jumping to areas within a document, so help documents on individual pages must point to separate pdf files.

Each heading that would need its own output pdf file to be a help link on pages within PMTS has a MS Word bookmark. IMPORTANT: Keep all bookmark names the same if they are already in the manual. This is important in Step 5.

Look for instructions to view the bookmarks in this document based on the Word version.

1. Edit this document as needed. If new headings are needed (11, 11.10 or 11.9.1 for example), then you must place bookmarks as needed.
   If information is added within a heading, then when re-exported the files should be ok.
2. Save the document.
   Click the Options button.
   Check the create bookmarks and click the Word bookmarks choice.
4. Open the pdf files using Adobe Acrobat software.

5. Split the full manual pdf file into separate pdf files using Organize pages tool. Choose Split by Top level bookmark and Output options Use bookmark names for file names. Also click off Do not overwrite existing files. The software will name the files based on the bookmark names into the same directory so that the help links on individual pages have the same filenames.

There is a macro in this file to split by bookmark into different MS Word files. This works but it resets the heading numberings in each file so it is not a duplicate of the full manual heading numbers.

IT IS BEST NOT TO USE THE MACRO