Consultant Selection System
ICMS Release – CSSWeb2

Release Notes

Version 1.0
June 19, 2008
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# Revision History

<table>
<thead>
<tr>
<th>Version</th>
<th>Date</th>
<th>List of change summaries</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td>6/19/2008</td>
<td>Original document structure and content</td>
</tr>
</tbody>
</table>
Objectives

The purpose of the Release Notes is to communicate new features and changes in this release of the CSSWeb System to the Consultant Firms as the key user of this external application. This document describes the release of CSSWeb that will be part of the implementation of the ICMS application.

About This Release

ICMS Release of CSSWeb contains the same functionality as the current version. There are additional enhancements to the application as well as some changes to the application behind the scenes.

New Features

The core set of features available in the ICMS Release are:

<table>
<thead>
<tr>
<th>#</th>
<th>APP / Page</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>CSSWeb - List My EOIs</td>
<td>A column was added to the EOI table showing the EOI Status. This data was added to the EOI functionality to show EOIs in one of the following states: 1. If the EOI is the Submitted one for an advertisement the system will warn the user that “This EOI was submitted, editing it will withdraw your submission and allow you to write over the information and submit it again.” 2. If the EOI status is In Progress, the system will display the first page of the EOI for editing. 3. If the EOI status is “Re-Submit”, the EOI was returned by CMB and open to allow for modifications, the system will behave as though it's just an EOI edit.</td>
</tr>
<tr>
<td>2</td>
<td>CSSWeb - Edit EOI JV Projects Page</td>
<td>This page was modified to allow for the following new functionality: 1. This page will only be active when a joint venture will be the “prime” firm for the EOI, and allows the joint venture to create a special inventory of project experience for the joint venture. 2. This special inventory of project experience is built from the joint venture members’ active inventory of project experiences, by each joint venture member contributing equally to it. 3. The page will display the current projects that have been selected. 4. A message will display if the joint venture team member does not have an active inventory. 5. If the inventory of project experience initially used for a joint venture member is no longer active, then all of the</td>
</tr>
<tr>
<td>#</td>
<td>APP / Page</td>
<td>Description</td>
</tr>
<tr>
<td>----</td>
<td>------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td></td>
<td></td>
<td>projects from that inventory are removed from the EOI and the user must add projects from the newly active inventory.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>6. All projects must be from the same inventory type, based on the target request. For instance, requests with a Construction Inspection work type, the projects must be from the active Construction Inspection inventory of project experience.</td>
</tr>
<tr>
<td>3</td>
<td>CSSWeb – Select JV Projects Page</td>
<td>This is a subpage of the JV Projects page.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1. This page will be labeled as “Select JV Projects”. It can be navigated to from the “JV Projects” page by selecting to add projects for a joint venture member.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. The page will display the list of projects from that joint venture member’s currently active inventory of project experience. The inventory type used will be determined from the target request. Those projects that had previously been selected will be marked. The user can then indicate which projects the joint venture member is contributing.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>3. Each joint venture member must contribute the same number of projects, with a total upper limit of 30 projects. Therefore, the page will limit how many projects the joint venture member can contribute.</td>
</tr>
<tr>
<td>4</td>
<td>CSSWeb – Salary Roster Submission</td>
<td>After submitting an annual salary roster or max rates roster the firm will now be required to enter the calendar year for the roster being submitted</td>
</tr>
<tr>
<td></td>
<td></td>
<td>5. CSSWeb – EOI                                                                                                                      It is now required that the forms needed for selection on a project will be uploaded through the Consultant Selection Application – Edit EOI function.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>The user’s folders can be browsed for existing scanned in files and loaded into their expression of interest to be used for CMB’s selection. If these forms are not loaded in this manner, the EOI will not be considered for scoring.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>For a Process I request, the EOI forms include the “Process I Additional Information Documents&quot;</td>
</tr>
<tr>
<td>6</td>
<td>General Note</td>
<td>1. With the new version of CSSWeb, firm information will be available to CMB immediately upon submitting it.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. The deadline for submitting EOIs will be at NOON on the date the EOI is due.</td>
</tr>
</tbody>
</table>
Appendix

**JV Members Page Screen Shot**

![ JV Members Page Screen Shot ]

New York State Department of Transportation
Integrated Contract Management System

**List My EOs**

*Contract #:* D025030  
*PIN:* PETER.K2

**Edit Expression of Interest**

1. General  
2. Contact Info  
3. Special Factors  
4. Team  
5. Office Distances  
6. Task Assignments  
7. DBE Cr, %Wk & Wkld  
8. Last Designation  
9. JV Projects  
10. EOI Forms  
11. Submission

**Joint Venture Projects to be scored**

- **Target Inventory Type being used:** Design Inventory
- **Number of JV Members:** 2
- **Total Number of Projects from all JV Members:** 30
- **Maximum Number of Projects from each JV Member:** 15

**VOLLMER ASSOCIATES LLP**

*Source Project Inventory:* Design Inventory activated on 02/01/2007

<table>
<thead>
<tr>
<th>Project #</th>
<th>Project Title</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>BRONX RIVER PKWY WOODLAND VIADUCT REHAB. WEST. CO.</td>
<td>View Remove</td>
</tr>
<tr>
<td>2</td>
<td>BUCKINGHAM DR / RTE 85 BRIDGE REPLACEMENT, ALBANY CO.</td>
<td>View Remove</td>
</tr>
<tr>
<td>3</td>
<td>CROTON PT. AVE RR YD BRIDGE REPLACEMENT, WEST. CO.</td>
<td>View Remove</td>
</tr>
</tbody>
</table>

**Add Projects**

**HUDSON VALLEY ENGINEERING ASSOCIATES, PC**

*Source Project Inventory:* Design Inventory activated on 12/01/2006

<table>
<thead>
<tr>
<th>Project #</th>
<th>Project Title</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>DESIGN SERVICES AGREEMENT (REGION 11), NYC</td>
<td>View Remove</td>
</tr>
<tr>
<td>2</td>
<td>DESIGN SERVICES AGREEMENT (REGIONS 1 &amp; 2), NY</td>
<td>View Remove</td>
</tr>
<tr>
<td>3</td>
<td>GRAND CENTRAL PKWY RAMPS @ FLUSHING MEADOWS PARK QUEENS CO.</td>
<td>View Remove</td>
</tr>
</tbody>
</table>

**Add Projects**

**JV Coordinator**

**JV Member**

[Save]  [Previous]  [Continue]  [Cancel]
Select JV Projects Page Screen Shot

New York State Department of Transportation
Integrated Contract Management System

**VOLLMER ASSOCIATES LLP**
JV Coordinator

**Source Project Inventory:** Design Inventory activated on 02/01/2007

<table>
<thead>
<tr>
<th>Include</th>
<th>Project #</th>
<th>Project Title</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>✔️</td>
<td>1</td>
<td>BRONX RIVER PKWY WOODLAND VIADUCT REHAB. WEST. CO.</td>
<td>View</td>
</tr>
<tr>
<td>✔️</td>
<td>2</td>
<td>BUCKINGHAM DR / RTE 85 BRIDGE REPLACEMENT, ALBANY CO.</td>
<td>View</td>
</tr>
<tr>
<td>✔️</td>
<td>3</td>
<td>CROTON PT. AVE RR YD BRIDGE REPLACEMENT, WEST. CO.</td>
<td>View</td>
</tr>
<tr>
<td>✔️</td>
<td>4</td>
<td>DESIGN SERVICES AGREEMENT (REGION 11), NYC</td>
<td>View</td>
</tr>
<tr>
<td>✔️</td>
<td>5</td>
<td>DESIGN SERVICES AGREEMENT (REGIONS 1 &amp; 2), NY</td>
<td>View</td>
</tr>
<tr>
<td>✔️</td>
<td>6</td>
<td>GRAND CENTRAL PKWY RAMPS @ FLUSHING MEADOWS PARK QUEENS CO.</td>
<td>View</td>
</tr>
<tr>
<td>✔️</td>
<td>7</td>
<td>I-278/BQE RECONST BROADWAY-QUEENS BLVD. PREL &amp; FINAL DESIGN</td>
<td>View</td>
</tr>
<tr>
<td>✔️</td>
<td>8</td>
<td>I-287 / TAPPAN ZEE BRIDGE CORRIDOR ALTERNATIVES ANALYSIS</td>
<td>View</td>
</tr>
<tr>
<td>✔️</td>
<td>9</td>
<td>I-495 LIE/CIP (EX 29-32) FINAL DESIGN, QUEENS CO.</td>
<td>View</td>
</tr>
<tr>
<td>✔️</td>
<td>10</td>
<td>I-495 LIE/CIP (EX 29-32) REASSES/RE-EVAL, QUEENS CO.</td>
<td>View</td>
</tr>
<tr>
<td>✔️</td>
<td>11</td>
<td>I-495 LIE/SOBE (EX 43-46) PREL DEIS / EIS, NASSAU CO.</td>
<td>View</td>
</tr>
<tr>
<td>✔️</td>
<td>12</td>
<td>I-495-LIE/SOBE INT.(EX 43-46) FINAL DESIGN, NASSAU CO.</td>
<td>View</td>
</tr>
<tr>
<td>✔️</td>
<td>13</td>
<td>I-678 VAN WYCK EXP / I-278 BQE VIADUCT REHAB, QUEENS</td>
<td>View</td>
</tr>
<tr>
<td>✔️</td>
<td>14</td>
<td>I-678 VAN WYCK EXP / WOODHAVEN BLVD TSM, QUEENS CO.</td>
<td>View</td>
</tr>
</tbody>
</table>

Save Return Cancel

Roster Submission Supporting Information

New York State Department of Transportation
Consultant Selection System

Submit Updates

**Roster Submission:**

Supporting Information:

Select the calendar year for the roster being submitted:

- 2008 - Next year
- 2007 - This year
- 2006 - Previous year 1
- 1997 - Previous year 10
EOI Forms Page

New York State Department of Transportation

Integrated Contract Management System

EOI Forms

1. General  
2. Contact Info  
3. Special Factors  
4. Team  
5. Office Distances  
6. Task Assignments  
7. Work % & Workload  
8. Last Designation  
9. JV Projects  
10. EOI Forms  
11. Submission

EOI Forms:

Upload the completed EOI forms. Those that require a signature should be signed and a PDF file produced. Select the Form Type, use Browse to locate the file and Add Form to upload it so it will be included as part of your EOI. Failure to complete and upload all of the EOI forms may result in your EOI being incomplete, resulting in your proposal being deemed ineligible for consideration.

Form Type: Affirmation of Understanding Form (PLL)  
Prior Non-Responsibility Form

File:  
Comment:

Add Form

Uploaded Forms:

<table>
<thead>
<tr>
<th>Form Type</th>
<th>Filename</th>
<th>Uploaded</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>PLL_023456_D123456.pdf</td>
<td>09/15/2006</td>
<td>View</td>
<td>Delete</td>
</tr>
</tbody>
</table>

Process I Additional Information Documentation:

The NYSDOT 255C document is due at the same time as the EOI. Also upload any other document that needs to be submitted to support your proposal. Select the Document Type, use Browse to locate the file and Add Document to upload it so it will be included as part of your EOI. Failure to include all supporting documentation may result in your EOI being incomplete, resulting in your proposal being deemed ineligible for consideration.

Document Type: NYSDOT 255C Submittal Form  
Proofs of Authority  
DBE Certification Letters

File:  
Comment:

Add Document

Uploaded Forms:

<table>
<thead>
<tr>
<th>Document Type</th>
<th>Filename</th>
<th>Uploaded</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>255C_023456_D123456.pdf</td>
<td>09/15/2006</td>
<td>View</td>
<td>Delete</td>
</tr>
</tbody>
</table>
Documents Page

This process will allow a consultant firm that has been shortlisted to upload documents to be used in the selection process. To access this page, click on Documents on the top menu and the following page will appear.

The table will list all of the projects that the logged in firm is short-listed on. Select a project by clicking the “Select” link under the actions column.

Submit Documents to CMB

1. Select one document type from the dropdown list of valid values.

2. Find a File
   Click on the SELECT arrow and browse through the folders/files available and find your file.
   Click on the file to select it and the filename will appear in the Find the File text box.

3. Enter comments – type in any text for information purposes.

4. Add Document
   a. Click on the Add Document button. The file will appear in the table of files
   b. Click on VIEW to open the file and view it.
   c. Click on DELETE to delete the file from the table list. The application will prompt the user to confirm the deletion.
      i. Click OK to confirm deletion, or
      ii. Cancel to prevent the deletion.

5. Submit to CMB
   a. Clicking on this button will make the uploaded documents immediately available to the Contract Management Bureau.