TOPS CONSULTANT QUICK STEP GUIDE

USER GUIDES PURPOSE

This guide is used to provide a streamlined list of actions for completing a process in TOPS. It highlights the essential steps in order, giving users a fast reference without detailed explanations.

RELATED INFORMATION

- District Contract Administrator – Help with accounts, permissions, or technical issues.
- TOP Consultant User Guide – Complete reference of all TOPS features, processes, and detailed instructions.
- TOP Consultant Frequently Asked Questions – Reference of common questions with clear, straightforward answers.
- TOP Consultant Troubleshooting Guide – Reference of common issues with step-by-step solutions to resolve them.

TOPS CONSULTANT
QUICK STEP GUIDE

TABLE OF CONTENT – Hold **Ctrl** and click any section title to jump directly to that section.

TOPS CONSULTANT QUICK STEP GUIDE

Accessing TOPS

1. Go to https://oklahoma.gov/odot.html > Business Center > Engineering & Software > Transportation Online Prof. Services.
2. Click **Login** and enter your credentials.

View Solicitations (Read Only)

1. Go to https://oklahoma.gov/odot.html > Business Center > Engineering & Software > Transportation Online Prof. Services.
2. Click **View Solicitations.**
3. On the **List Solicitation** page, view the **General Message** details and a **List of Solicitation** by calendar year.

Creating a New Account

1. Go to the TOPS login page.
2. Click **Register** to create a new user account.
3. Check your email for a temporary password.
4. Wait for your **Primary Organization Profile Manager** to authorize your user account. (If the person is registering a new Organization with ODOT for the first time, they will be designated as the **Primary Organization Profile Manager**.)
5. Once authorized, log in with your temporary password.

Password Reset

1. Go to the TOPS login page.
2. Click **Forgot Password** and follow the prompts.

Updating Organization Info

1. Log into TOPS.
2. Go to **Solicitations Home > My Organization Info**.
3. Click the **Edit** icon.
4. Update your contact details or organization profile.
5. Click **Apply Changes** to save.

Authorizing Users

1. Log into TOPS.
2. Go to **Solicitations Home > My Organization Info** and click **Edit**.
3. Scroll to **Users who are authorized to act on behalf of My Organization**.
4. Click the **Edit** icon next to the user's name.
5. Set **Authorized to Conduct Business** or **Invoice Entry** to **Yes** as needed.
6. Click **Apply Changes**.

↑ **Back to Table of Content**

TOPS CONSULTANT QUICK STEP GUIDE

Viewing Solicitations

1. Log into TOPS.
   a. Click **View Solicitations** from the left navigation menu.
2. Use filters or search to locate specific solicitations.
3. Click the **Details** link to review information.
4. Only OPEN solicitations are eligible for submission.

Submitting Response Packet

1. From the **View Contract Requirements** screen, click **Submit My Response Packet**.
2. On the **Edit My Solicitation Response Record** screen.
   a. Verify solicitation and EC Number/Contract ID.
3. Click **Browse** to upload your file.
   a. Optional – Add an Organization Project ID.
4. Click **Submit**.
   a. You'll receive an on-screen confirmation.

Using Express Upload

1. Log into TOPS.
2. Select **Express Upload** from the left navigation menu.
3. Choose the **Solicitation Name** and **EC Number**/Contract ID from the dropdowns.
4. Click **Browse** to upload your file.
5. Click **Submit My Document**.
   a. You'll see your file in the Submitted Documents table.

Tracking Solicitation Status

1. Log into TOPS.
2. Navigate to **My Uploaded Letters of Interest** from the homepage.
3. Check the **Shortlisted** and **Selected for Contract** columns.
4. Look for email updates on your status.

Authorizing a User for a Solicitation Debrief Request

1. As a Primary Owner of an organization, go to **My Organization Info** and click **Edit**.
2. Scroll to **Users who are authorized to act on behalf of My Organization**.
3. Click the **Edit** icon next to the user's name.
4. Set **TOPS Debrief User** to **Yes** as needed.
5. Click **Apply Changes**.

Submitting a Solicitation Debrief Request

1. Click the **List My Debrief Requests** link on the home page.
2. Click the **Create** Button.
3. Fill out the details and click the **Create** Button Again.
4. Observe the email that the user will receive.

↑ Back to Table of Content

TOPS CONSULTANT
QUICK STEP GUIDE

Verify Organization Invoice Access

1. Log into TOPS. Log into TOPS.
2. Go to **Solicitations Home > My Organization Info** and click **Edit**.
3. Check **Invoices Enabled**.
   a. **Y (Yes)** – The **Invoices Enabled** option appears in the left menu.
      i. The **Invoices** tab also shows at the top of the page.
   b. **N (No)** – Contact the District Contract Administrator.

Authorizing Users for Invoice Access

1. Log into TOPS.
2. Go to **Solicitations Home > My Organization Info**, then click the Edit icon.
3. Scroll to **Users who are authorized to act on behalf of My Organization**.
4. Check the **Invoice Entry** column.
   a. **Y (Yes)** – User is authorized.
   b. **N (No)** – User is not authorized.
5. To grant access:
   a. Click the **Edit icon** for the user's record.
   b. Set **Invoice User** to **Yes**, then click **Apply Changes**.
6. Repeat for each staff member who needs invoice access.

Adding or Updating Your Organization Logo

1. Log into TOPS.
2. Go to **Solicitations Home > My Organization Info**, then click the Edit icon.
3. Scroll to **My Organization Logo**.
   a. If a logo exists, click **Edit/Upload**.
   b. If no logo is listed, click **Create**.
4. In the **Edit Company Logo / Images** window:
   a. Select **LOGO** for **Image Type**.
   b. Set **Image Status** to **Active**.
   c. Upload a JPG or PNG file under **Image File**.
   d. Click **Apply Changes**.
5. Confirm the logo appears in **My Organization Logo**.
6. Go to the **Invoice Processing** page and verify the logo displayed in the **Invoice Navigation** panel.

Invoice Menu Page Overview

1. Log into TOPS and open the **Invoice Processing** page.
2. Use the **Invoice Navigation** menu to:
   a. **Create and Edit Invoices** – Start or update an invoice.
   b. **View Contract Lines** – Review contract details.
   c. **View Contract Line Status** – Check contract line status.
   d. **View Hourly Rates** – Confirm approved hourly rates.
   e. **Prime Payments to Subconsultants** – View payments made to subconsultants.
   f. **Subconsultant Payment Records** – Track payments received by subconsultants.
   g. **Detail Hourly Rates** – View detailed hourly rates (if applicable).
3. Review the **Organization Information** table for Organization details, supplier number, and logo.
4. Check the **MESSAGE** box for ODOT notices and updates.
5. Scroll to the **Listing of All Invoices** grid to view and search invoices by ID, contract, or status.

↑ Back to Table of Content

List of Invoices for Entry Page Overviews

1. Go to the **Invoice Processing** page.
2. In the **Invoice Navigation** menu, click **Create and Edit Invoices**.
3. The **List of Invoices for Entry** page opens, showing the **Listing of All Invoices** grid.
    a. Only invoices in the Entry phase are listed.
    b. Submitted invoices no longer appear here.
4. Review invoice details in the grid, including vendor, contract, PO balance, workflow status, and service period dates.

Create an Invoice Header

1. On the **List of Invoices for Entry** page, click **Create**.
2. In the **Edit TOPS Invoice** page, review the **Vendor Information** box.
3. Complete the header fields:
    a. **TOPS Contract ID (EC or PS)** – Select the contract.
    b. **Invoice ID** – Enter a unique ID (max 18 characters).
    c. **Payment No.** – Enter the next sequence number.
    d. **Service Period From/To Dates** – Enter the billing dates.
    e. **Invoice Date** – Select using the calendar icon.
    f. **Milestone Event** – Select if required (30%, 60%, 90%, Contract Complete).
    Note*: The 30/60/90 milestones apply only to contracts with a Plan, Submittal, and Estimates (PS&E) component.*
    g. **Invoice Amt** – Enter total billed (0 for hourly rate invoices).
    h. **Final Invoice for this Task Order** – Select **Yes** if final and attach certification.
    i. **Comments/Notes** – Enter optional comments.
4. Click **Create – Stay Here** to save.
5. Confirm the **Invoice Attachment Create** button appears.

Create Invoice Detail Lines

1. On the **Edit TOPS Invoice** page, scroll to **Invoice Detail Lines** and click **Create**.
2. Complete fields in order:
    a. **TOPS Contract ID, Invoice ID, Invoice Date, Service Periods**.
    b. **Supplement No, Task Order No, Amendment No, Service Type**.
    c. **Vendor Doing Work, Component, Service Job Piece**.
    d. **PS PO ID, PO Line Number, PO Schedule Number, PO Distribute Line Nbr**.
    e. **Invoice Line Amount** – Enter billed amount or 0 for hourly lines.
    f. Add **Comments** or **Parcel Comment** if needed.
3. Click **Create Detail** to save (green confirmation appears).
4. Use the breadcrumb to return to the invoice.
5. Review the line in the grid.
    a. Click **Edit icon** to update if needed.
    b. Resolve any Red ✗ in **DB Error** before submission.
6. Repeat until all detail lines are created.
7. Continue based on **Service Type Category**:
    a. **Lump Sum** – Ready for attachments.
    b. **Hourly / Mixed** – Enter Personnel, Travel, and Misc. Costs.

↑ Back to Table of Content

Create Hourly Personnel Cost Records

1. In the **Invoice Detail Lines** grid, go to **Personnel Cost Records** and click **Create**.
2. On the **Edit TOPS Invoice Detail HR Costs** page, complete fields in order:
   a. **Start Date of Work** – First day worked.
   b. **End Date of Work** – Last day worked.
   c. **Personnel Category** – Select labor category.
   d. **Total Hours for Period** – Enter hours worked.
   e. **Hourly Rate** – Auto-populated by category.
   f. **Total Cost** – Auto-calculated (hours × rate).
   g. **Comments** – Optional notes.
3. Click **Create** to save the record.
4. Repeat for each staff member as needed.
5. Use the **Edit icon** to update a line.
6. Once all Personnel, Travel, and Miscellaneous costs are entered, proceed to attachments.

Create Hourly Travel Cost Records

1. In the **Invoice Detail Lines** grid, scroll to **HR Travel Cost Records** and click **Create**.
2. On the **Edit TOPS Invoice Detail HR Travel Cost** page, complete the fields in order:
   a. **Start Date of Travel / End Date of Travel**.
   b. **Description** – Enter trip label.
   c. **Mileage Claimed** – Enter miles traveled.
   d. **Mileage Rate** – Enter correct ODOT rate (from list).
   e. **Per Diem, Lodging, Incidental Cost** – Enter amounts as applicable.
   f. Review system-calculated totals (**Mileage Cost** and **Total Travel Cost**).
   g. Add **Comments** if needed.
3. Click **Create** to save the record.
4. Repeat for each trip.
5. Use the **Edit icon** to update records if needed.
6. Once all Personnel, Travel, and Miscellaneous costs are entered, proceed to attachments.

Create Hourly Miscellaneous Cost Records

1. In the **Invoice Detail Lines** grid, scroll to **HR Misc Costs** and click **Create**.
2. On the **Edit TOPS Invoice Detail HR Misc Costs** page, complete the fields:
   a. **Total Misc Cost** – Enter the amount (format: 999.99).
   b. **Comments** – Describe the expense.
3. Click **Create** to save the record.
4. Repeat for each reimbursable expense.
5. Use the **Edit icon** to update records if needed.
6. Once all Personnel, Travel, and Miscellaneous costs are entered, the invoice is ready for attachments.

↑ Back to Table of Content

Attach Invoices Supporting Documentation

Warning: *Once an invoice is submitted, attachments cannot be edited. Corrections require creating a new invoice.*

1. After adding all invoice detail lines, return to the **Edit TOPS Invoice** page using the breadcrumb.
2. In the **Invoice Attachments** section, click **Create**.
3. On the **Edit TOPS Invoice Attachment** page, complete the fields:
   a. **Short Description** – Enter a brief label.
   b. **Description** – Explain the file contents.
   c. **Attachment** – Choose and upload the file.
      i. Files must be uploaded before submission.
      ii. File names cannot contain commas.
4. Click **Create** to save the attachment.
5. Repeat for all required files.
6. Use the **Edit icon** to update records if needed.
   Note: *Even if only change the description, you must reattach the file.*

Submitting an Invoice to ODOT

1. On the **Edit TOPS Invoice** page, check the **Invoice Line Amount** column.
   a. **Lump Sum** lines show their amount.
   b. **Hourly** lines show 0 and must be updated.
2. For each Hourly line, click the **Edit icon**.
3. On the **Edit TOPS Invoice Detail** page, total the amounts in **Personnel, Travel, and Misc. Costs**.
4. Enter this combined value in the **Invoice Line Amount** box.
5. Click **Apply Changes – Stay Here** and repeat for each Hourly line.
6. Back on the **Edit TOPS Invoice** page, enter the total of all line amounts in the **Invoice Amt** field.
7. Click **Apply Changes – Stay Here**.
8. Confirm that the **Submit for Processing** and **Generate Invoice Document** options appear.
   Warning: *If the Invoice Amt is $0.00 or does not equal the sum of detail lines, the **Submit for Processing** button will not appear.*

Generating an Invoice Document

Note: *Generated invoices are snapshots. If changes are made, regenerate a new version. No changes are allowed after submission.*

Before Submission

1. On the **Edit TOPS Invoice** page, enter all amounts and click **Apply Changes – Stay Here**.
2. The **Generate Invoice Document** option appears beside **Submit for Processing**.
3. Click **Generate Invoice Document**.
   a. Review, save, or send the report as needed.

After Submission

1. Go to the **Invoices** tab and locate the submitted invoice in the **Listing of All Invoices** grid.
2. Find the invoice line and click the **Details (magnifying glass)** icon.
3. In the top-right corner, click **Generate Invoice Document**.
4. A new window opens with the invoice in PDF or browser view.
   a. Use the options on the page to save or print the document.

↑ Back to Table of Content

TOPS CONSULTANT QUICK STEP GUIDE

Viewing Invoices Status and Details

1. Go to the **Invoices** tab and locate the invoice in the **Listing of All Invoices** grid.
2. Click the **Details (magnifying glass)** icon to open the invoice.
3. At the top of the **List Invoice Lines** page, review the summary fields:
    a. **Contract ID** – Contract tied to this invoice.
    b. **Invoice ID** – Unique identifier for the invoice.
    c. **Payment No** – Sequential payment number.
    d. **Invoice Amt** – Total dollar amount billed.
    e. **Status** – Current stage (Entry, Submitted, In Process, Approved, Paid).
    f. **Approvals** – Shows amount approved, date approved, and user who approved.
4. Scroll to the **Invoice Detail Lines** grid to review:
    a. **Line-level billing** – Amount billed for each service line.
    b. **Vendor details** – Prime or Subconsultant performing the work.
    c. **Approvals** – Amounts approved, disallowed, and reasons for disallow.
5. Use the search bar or filters to locate invoices by:
    a. **Contract ID** – ODOT-assigned contract number.
    b. **Invoice ID** – Invoice identifier entered by the Organization.
    c. **Vendor Name** – Organization submitting the invoice.
    d. **Status** – Current stage of processing.

Viewing Invoice Payment Status

1. Go to the **Invoices** tab and locate the invoice in the **Listing of All Invoices** grid.
2. In the grid, review:
    a. **Invoice Status** – Current stage (Entry, Submitted, In Process, Approved, Paid).
    b. **Date Paid** – When payment was issued.
    c. **Payment Id** – Payment confirmation number.
3. Click the **Details (magnifying glass)** icon to open the invoice.
4. At the top of **List Invoice Lines**, review:
    a. **Amt Approved for Payment** – Portion approved.
    b. **Date Approved for Payment** – When approval was granted.
    c. **Approved For Payment By** – Approver name.
5. Scroll to **Invoice Detail Lines** for additional payment details.

Prime Payments to Subconsultants Page Overview

1. Go to the **Invoices** tab and, in the **Invoice Navigation** menu, click **Prime Payments to Subconsultants**.
2. On the **List Prime Payments to Subconsultants** page, review the **Prompt Payment Requirement Status Legend** for payment compliance indicators.
3. Review the **Statistics Panel** to see counts and percentages of prompt payment compliance by prime consultant.
4. Scroll to the **Prime Payments to Subconsultants Grid** and review:
    a. **Prime Consultant Name** – Consultant responsible for the contract.
    b. **Invoice ID / Invoice Date / Invoice Amount** – Identifies the parent invoice and its details.
    c. **Payment Status** – Current compliance outcome (Paid Promptly or Failed).
    d. **Prime Payment to Sub Date / Amount** – When and how much was paid to the subconsultant.
    e. **Subconsultant Pay Date / Amount Received by Sub** – Confirms when and how much the subconsultant received.

↑ Back to Table of Content

Create a Prime Detail Payment to Subconsultant Verification

1. On the **List Prime Payments to Subconsultants** page, scroll to the **Prime Payments to Subconsultants Grid**.
2. Search for the line item and click **Edit**.
3. On the **Prime Detail Payment to Subconsultant Verification** page, complete the fields in the **Payment Entry** section:
   a. **Prime Payment Date**
   b. **Prime Payment to Sub Amount**
   c. **Prime Payment to Sub Comment**
   d. **ODOT Comment**
4. In the **My Payment Record Attachments** section, click **Create Attachment**.
5. On the **Edit Payment Record Attachment** page, complete the fields and click **Create**:
   a. **Choose File** (Do not use commas in the file name.)
   b. **Attachment Type**
   c. **Description**
6. Review the new line in **My Payment Record Attachments**. To add more, click **Create Attachment** again.
   a. Use **Edit** to update an attachment.
7. Click **Apply Changes** to save updates.
   a. The payment is now visible to the subcontractor.
8. The system returns to the **List Prime Payments to Subconsultants** page.
9. Search and confirm the payment entry appears in the list.
   a. Click **Edit** to update the line if needed.

Subconsultants Payment Records Page Overview

1. In the **Invoices** tab, on the **Invoice Navigation** menu, click **Subconsultants Payment Records**.
2. On the **List Subconsultant Detail Payment Verification** page, review the **Prompt Payment Requirement Status Legend** at the top.
3. Scroll to the **Subconsultant Payment Verification Grid**.
4. In the grid, review details such as:
   a. **TOPS Contract ID**
   b. **Prime Consultant Name**
   c. **Invoice ID** and **Invoice Date**
   d. **Date Approved for Payment** and **Date Paid**
   e. **Amount Approved** or **Amount Disallowed**
   f. **Amt Received by Sub** and **Subcon Pay Date**
5. To enter or update payment confirmation, click **Edit**, complete the form, and save.

List My Purchase Orders Page Overview

1. Go to the **Invoices** tab and click **List My Purchase Orders**.
2. The **List My Purchase Orders** page opens, showing the organization’s purchase orders.
3. Use the **Filters** section to search by **PO ID**. Enter the **PO ID** and click **Search**.
4. Review the grid details, including **PO ID, Vendor, Project ID, Amt Open, PO Status, and Distribution Line Status**.
5. Use the **Actions** menu to reset filters, or remove active filters by clicking the **X**.

↑ Back to Table of Content

Detail Hourly Rates Page Overview

1. Go to the **Invoices** tab and select **Detail Hourly Rates**.
2. Choose an **EC NO (EC ID/Contract ID)** from the dropdown list.
3. Click **Submit**.
4. Review personnel, travel, and miscellaneous cost records displayed in the grids.

View Performance Evaluations Page Overview

1. Go to the **Invoices** tab and click **View Performance Evaluations**.
2. The **List Performance Evaluations** page opens showing the organization's evaluation records.
3. Click the **Details** icon to view the evaluation details.
4. On the details page, review **Evaluation Factors**, **Rating Scores**, and **Overall Rating**.
5. To add a comment, click **Create** at the bottom of the page, enter your text in the **Eval Comment** box, and click **Create**.
6. Edit comments by clicking the **Edit** icon next to an existing comment.

View Hourly Rate Review Page Overview

1. Go to the **Invoices** tab and click **View Hourly Rates**.
2. On the **Hourly Rate Review** page, select a TOPS No (EC ID/Contract ID) from the dropdown list.
3. The grid displays hourly rate records for the selected contract, sorted by Consultant Name.
   a. **Effective Date** – Start date when the rate is valid.
   b. **Personnel Category** – Labor role or classification (e.g., Engineer, Technician).
   c. **Total Hourly Rate** – Organization's hourly billing rate for that category.

↑ [Back to Table of Content]