



**encouraging
diversity
growth & equity**

Contract Tracking System 2 Year Colleges

Step-by-Step Guide...

Table of Contents

	Page
A Word About the EDGE Program	02
How to Obtain a Log-on Password	03
How to Log-on to CTS	04
Data Input (Process)	05
<i>Add a New Project</i>	05
Project View Screen	06
Project Enter Screen	10
<i>Add a New Contract</i>	08
Contract View Screen	08
Contract Enter Screen	09
<i>Add a New Bid</i>	11
Bid Screen View	11
Bid Enter Screen	12
<i>Add a New Company</i>	14
Company Enter Screen	14

If You Need Assistance...

If at any point in the process you need assistance, become unsure of what to do next, or have any questions, please contact:

Todd McGonigle, Program Manager
Equal Opportunity Division
30 E. Broad, 18th Floor
Columbus, OH 43215
614-466-8380
todd.mcgonigle@das.state.oh.us (email)

A Word About the EDGE Program

As its name suggests, the State of Ohio's EDGE program provides an EDGE to small businesses by **Encouraging Diversity, Growth and Equity** in public contracting. EDGE is an assistance program for economically and socially disadvantaged business enterprises.

The State of Ohio developed the program because it is committed to making all state contracts, services, benefits and opportunities available without discriminating on the basis of race, color, religion, sex, national origin, disability, age or ancestry.

The state recognizes the need to encourage, nurture and support the growth of economically and socially underutilized businesses to foster their development and increase the number of qualified competitors in the marketplace.

EDGE establishes goals for state agencies, boards and commissions in awarding contracts to certified EDGE eligible businesses. EDGE applies to procurements of supplies and services, professional services, information technology services, construction and architectural and engineering services.

All state agencies are required to submit contract information in accordance with O.A.C. 123:2-16-13.

How to Obtain a Log-on Password

Steps:

1. Send an email to Todd McGonigle (todd.mcgonigle@das.state.oh.us). Include in the email the following information: first & last name, email address, agency name, person authorizing log-on access.
2. After submitting password request, an email letter will be sent to the email address submitted with the request within 24 hours. The email will include: sign-on name, password, and links to both the test/training database and the production database.
3. You are now authorized to enter data into CTS.

QUICK TIPS

1. Request a “User Name” and “Password” at least 24 hours in advance of need.
2. “User Name” is always the first and last name.
3. “User Name” is NOT case sensitive.
4. “Password” IS case sensitive.

How to Log-on to CTS

(Log-on Screen)



OhioDAS
Equal Opportunity

Welcome to the CTS Application!

Log In Portal

User Name:

Password:

Remember me next time.

Steps

1. Enter assigned user name into the “User Name” field.
2. Enter assigned password into the “Password” field.
3. Click on the “Log In” button.

QUICK TIPS

1. Before logging-on you must request a user name and password from the Equal Opportunity Division. Refer to “How to Obtain a Log-on Password” instructions.
2. Selecting the “Remember me next time” box will input your information on next log-on.
3. Forgot Password? Click on “Forgot Password?” button. A pop-up box will appear on the screen. Enter your user name and select “Submit.” A new password will be sent via email immediately.

Data Input (Process)

Add a New Project

(Project Screen View)

State of Ohio

Contract Tracking System

Viewing 2 Years Construction Projects

[Add New 2 Year Project](#) [Logout](#) [Archive View](#) User Name: Todd 2 Year McGonigle
Agency: Rio Grande Community College (356)

Search Listing for which Project Number: 

		Project #	Project Name	Owner	Admin	Exempt	Estimated Cost	Status
View Contracts	Edit Project	356-2008-001	Water Tower North Campus	RGC	RGC	<input checked="" type="checkbox"/>	\$2,000,000.00	Active

Note: After logging in, the “Project Screen” will be the current view. Selection options for manual input are “Add New 2 Year Project”, “Logout”, and “Archive View.”

Steps:

1. Select “Add New 2 Year Project.”

QUICK TIPS

1. If no projects have been entered, “There are currently no projects on file for you to view at this time.” Message will be displayed.
2. If projects have been entered, you may edit the “Projects”, “Contracts”, and “Bids” for any project that has a status of “Active.”
3. Project Screen displays a quick view of the following table headers: Project #, Project Name, Owner, Admin, Estimated Cost, and Status for each project entered.
4. By using the “Search “Listing for which Project Number” field, you may enter a project number to make that project the focus.

(Project Enter Screen)

Current User: Todd 2 Year McGonigle



Project Information

Administering Agency: RGC Project Owner: *

Administering Agency CAS Code: 356 Owner CAS Code:

Project Number: * Status:

Project Name: *

Address:

City: State: Ohio

Zipcode: County:

Bid Date:

Projected Start Date: Projected Completion Date:

Actual Start Date: Actual End Date:

Estimated Total Cost: * Edge Exempted: Yes No

Original Award Amt: 0.00

Comments:

Steps:

2. Enter known data:

- **Project Owner** – Select the three letter code of your college.
- **Project Number** – Enter the College’s “Project Number.” This number must be a unique number. “Project Numbers” are to be formatted as follows: College CAS code, Year project began, and Project number i.e. 356-2008-001.
- **Project Name** – Enter the name your college has given the project.
- **Status** – Enter current status, Active, Completed, or Void.
- **Address** – Enter the street address. **Note:** If project has more than one address, use the most common address associated to the project.
- **City** – Enter the city. **Note:** If project has more than one city, use the most common city associated to the project.
- **Zip code** – Enter the zip code. **Note:** If project has more than one zip code, use the most common zip code associated to the project.
- **County** – Enter the county. **Note:** If project has more than one county, use the most common address associated to the project.
- **Bid Date** – Enter bid opening date.
- **Project Start Date** – Enter projected start date.
- **Project Completion Date** – Enter projected completion date.
- **Actual Start Date** – Enter actual start date.

- **Actual End Date** – Enter actual end date.
- **Estimated Total Cost** – Enter estimated total cost.
- **Comments** – Enter any comments. A record of all comments is retained and available for review by anyone with proper access.
- Click on “**Submit Project**” to save or “**Cancel**” to disregard the data.

QUICK TIPS

1. All fields with a “**RED**” asterisk are **REQUIRED** fields.
2. Administering Agency and Administrating Agency CAS Code and Owner CAS Code fields are populated automatically based on the user’s logon authority.
3. All date fields and dollar fields are preformatted. If data is entered incorrectly, an error message will be displayed. If possible, field formatting will attempt to correct the entered data’s format.
4. “Original Award Amt” field is populated automatically from the “**Original Award Amt**” field on the “Contract Screen” fields.
5. “EDGE Exempted” field is defaulted to “Yes” as 2 year colleges are currently not required to participate in the EDGE Program.

(Contract Screen View)

State of Ohio

Contract Tracking System

Viewing 2 Years Construction Projects

[Add New 2 Year Project](#) [Logout](#) [Archive View](#)

User Name: Todd 2 Year McGonigle

Agency: Rio Grande Community College(356)

Search Listing for which Project Number:



		Project #	Project Name	Owner	Admin	Exempt	Estimated Cost	Status
View Contracts	Edit Project	356-2008-001	Water Tower North Campus	RGC	RGC	<input checked="" type="checkbox"/>	\$2,000,000.00	Active

Contract(s) View for:

Project Number: 356-2008-001

Project Name: Water Tower North Campus

[Add New Contract](#)

		Contract #	Name	Waiver	Estimated Cost	Prime/Sub	Status
View Bids	Edit Contract	356-2008-001-P01	Main Water Lines North Campus	<input checked="" type="checkbox"/>	\$475,000.00	P	Active
View Bids	Edit Contract	356-2008-001-P02	Finish Lanscaping Warter Town North Campus	<input checked="" type="checkbox"/>	\$28,500.00	P	Active

[Hide Contract View](#)

Note: When selecting “View Contracts” for an existing project displays an additional table of all current “Active” status contracts. Above the contract table the “Project Number” and “Project Name” of the contract(s) associated with the project. Selection options are “Add New Contract”, “View Bids”, “Edit Contract”, and “Hide Contract View.”

Steps:

1. Select “Add a New Contract.”

QUICK TIPS

1. If no contracts have been entered, “There are currently no contracts on file for you to view at this time.” Message will be displayed.
2. If contacts have been entered, you may edit the “Contracts”, and “Bids” for any project that has a status of “Active.”
3. The Contract Screen displays a quick view of “Active” contracts with the following table headers: Contact #, Name, Waiver, Estimated Cost, Prime/Sub, and Status.

(Contract Enter Screen)

Current User: Todd 2 Year McGonigle

Contract
Tracking
System

Project Information

Administering Agency: RGC

Administering CAS Code: 356

Project Owner: RGC

Project Owner's CAS Code: 356

Project Number: 356-2008-001

Project Name: Water Tower North Campus

Contract Information

Contractor Type: Prime Sub *

Status: Active

Type: Number: *Contract Name: *Award Date: Completion Date: Procurement: Original Award Amount: *Estimated Total Cost: *Edge Waiver: Yes NoComments:

Cancel

Submit Contract

Steps:

2. Enter known data:

- **Contractor Type** - Enter if the contract is a Prime of Sub contract.
- **Type** – Select type of contract. Note: Dropdown box will appear of known types based on your typing.
- **Number** – Enter the Administrating Agency’s “Contract Number”. This number must be a unique number. “Number” can be a combination of alpha and/or numeric characters.
- **Contract Name** – Enter name.
- **Award Date** – Enter the date contract was awarded.
- **Completion Date** – Enter the completion date.
- **Procurement** – Select the category of contract.
- **Original Award Amount** – Enter award amount.
- **Estimated Total Cost** – Enter total cost.
- **EDGE Wavier** – Defaults to “Yes.”
- **Comments** – Enter any comments. Records of all comments are retained and available for review by anyone with proper access.
- **Click on “Submit Contract” to save or “Cancel” to disregard the data.**

QUICK TIPS

1. Project Information is located at the top of the view. Project headers displayed are: “Administering Agency”, “Administering CAS Code”, Project Owner”, Project Owner’s CAS Code, Project Number”, and “Project name.”
2. All fields with a “**RED**” asterisk are **REQUIRED** fields.
3. All date fields and dollar fields are preformatted. If data is entered incorrectly, an error message will be displayed. If possible, field formatting will attempt to correct the entered data’s format.
4. “EDGE Waiver” field is defaulted to “Yes” as 2 year colleges are currently not required to participate in the EDGE Program.

(Bid Screen View)

State of Ohio
Contract Tracking System

Viewing 2 Years Construction Projects

[Add New 2 Year Project](#) [Logout](#) [Archive View](#)

User Name: Todd 2 Year McGonigle
 Agency: Rio Grande Community College (356)

Search Listing for which Project Number: 

		Project #	Project Name	Owner	Admin	Exempt	Estimated Cost	Status
View Contracts	Edit Project	356-2008-001	Water Tower North Campus	RGC	RGC	<input checked="" type="checkbox"/>	\$2,000,000.00	Active

Contract(s) View for:

Project Number: 356-2008-001

Project Name: Water Tower North Campus

[Add New Contract](#)

		Contract #	Name	Waiver	Estimated Cost	Prime/Sub	Status
View Bids	Edit Contract	356-2008-001-P01	Main Water Lines North Campus	<input checked="" type="checkbox"/>	\$475,000.00	P	Active
View Bids	Edit Contract	356-2008-001-P02	Finish Lanscaping Warter Town North Campus	<input checked="" type="checkbox"/>	\$28,500.00	P	Active

Hide Contract View

Bid View for:

Contract Number: 356-2008-001-P01

Contract Name: Main Water Lines North Campus

[Add New Bid](#)

Prime/Sub: P

[Add New Company](#)

		FTID #	Company Name	Awardee	Bid Amount	Edge Status	COC Date
Company Detail	Edit Bid	520811924	G-S Company Wire & Iron Works	<input type="checkbox"/>	\$450,000.00	N/A	01/05/2002
Company Detail	Edit Bid	650439970	Pennsylvania Earth Tech, Inc.	<input type="checkbox"/>	\$125,465.00	N/A	09/12/2001
Company Detail	Edit Bid	111111111	Todds Construction	<input type="checkbox"/>	\$480,000.00	N/A	01/01/1900

Hide Bid View

Note: When selecting “View Bids” an additional table is displayed of current bids. Above the Bid table is the “Contract Number” and “Contract Name” for the contract associated with the bid. Selection options are “Add New Bid” and “Add New Company.”

QUICK TIPS

1. If no Bids have been entered, “There are currently no bids on file for you to view at this time.” Message will be displayed.
2. If contacts have been entered, you may edit the “Contracts”, and “Bids” for any project that has a status of “Active.”

Add a New Bid

QUICK TIPS

1. Contract Information is located at the top of the view. Contract headers display: “Contract Number” and “Contract Name.”
2. **DO NOT** select awardee until the last bid has been entered.
3. Select “Can’t Find Company” if a search does not locate the bid company.
4. Enter either FTID Number or Company Name. Select “Find.” If company is in database, known information will be populated.
5. “EDGE Status” is populated automatically if company is EDGE certified.
6. “COC Expiration Date” is populated automatically with the most current date of award.

(New Company Enter Screen)

The screenshot shows a web browser window with the URL <http://apps.das.ohio.gov/CTS/companyForm.aspx>. The browser's address bar and menu bar are visible. The page title is "CTS - Company Information". In the top right corner, it says "User Name: Todd 2 Year McGonigle". On the left side, there is a logo for "Contract Tracking System" and two buttons: "Cancel" and "Add Company". The main content area is titled "Company Information" and contains the following fields:

- FTID Number: (Ex. 123456789)
- Company Name:
- Address:
- City: State:
- Zip: County:
- Email:
- Phone: (Ex. (999) 999-9999)

Steps:

1. After selecting “Can’t Find Company” the company enter screen is displayed.
2. Enter known data:
 - **FTID Number** – Enter FTID Number.
 - **Company Name** – Enter Company Name.
 - **Address** – Enter address.
 - **City** – Enter city.
 - **State** – Enter state.
 - **Zip** – Enter zipcode.
 - **Email** – Enter email address.
 - **Phone** – Enter phone number.
 - **Click on “Add Company” to save or “Cancel” to disregard the data.**

QUICK TIPS

1. FTID number must be entered in this format ##-#####.
2. After entering information you may select the entered company on the bid screen.
3. “Certification Status” field will be updated on next date.
4. Select “Can’t Find Company” if a search does not locate the bid company.