

Tips for granting access to the online Bidders/Proposers List and/or Solicitation Form



Firms can establish as many AZ UTRACS System users as needed for the online Bidders/Proposers List and/or Solicitation Form. The Primary and Secondary contacts entered in an active AZ UTRACS Registration are the individuals from the firm who can grant access to other firm employees for the Bidders/Proposers List and/or Solicitation Form.

Primary and Secondary contacts are automatically granted access to the Bidders/Proposers List and/or Solicitation Form. To better understand the account set up process, you must first understand that the AZ UTRACS Access is a two-step process.

Gaining Access to the AZ UTRACS System is a two-step process.

STEP 1 – “[Create a User Account](#)” using the “Request Access” link on the [login page](#). This step is required for anyone wishing to access the system, and is the same for either the AZ UTRACS Registration or to use the online Bidders/Proposers List and/or the Solicitation Form.

STEP 2 – “[Register Your Firm](#),” if your firm is not already registered in AZUTRACS to create a firm profile.

STEP 3 – “[Grant User Access](#)” to specify users for the Bidders/Proposers List and/or Solicitation Form that **ARE NOT** the primary or secondary contacts for the firm, users must be granted access to the firm by the primary or secondary contacts. Unassigned users can use the Firm (DBE) Search Directory to find out who the Primary and Secondary contacts are for your firm.

Note: Users who get “System Access” but do not have Firm Access will be able to log in, but will not have any firms in the Firm Dropdown.

How to give users access to your firm for the Online Bidders/Proposers List and/or Solicitation Form

- 1) To give an employee access to create a Bidders/Proposers List and/or Solicitation Form, login and hover over “Contract Compliance” from the menu on the home page and click “Grant Firm Access.” To begin, select the firm name from the drop-down list.
- 2) Add the employee’s **email** in the field, select their primary role then check the boxes for the access you would like to give them (*this can be both forms or only one,*) and click the Add button. The users will receive a notification that they have been granted access and will be prompted to create a login if one is not already created.
- 3) Once a user is added, you will see a “status” next to the User’s email. The “In process” status means the user has never selected the Firm to create a Bidders/Proposers List and/or Solicitation Form. Those with an “active” status have logged in and selected the firm to start a Bidders/Proposers List and/or Solicitation Form; you can also add or delete users as needed.

There is no limit to the number of employees who can have access to the Bidders/Proposers List and/or Solicitation Form.

Note: Employees who have access to the Bidders/Proposers List and/or Solicitation Form

(but are not the primary or secondary contact for the firm), do not have access to the firm registration page.

Questions or concerns during this process? *Let us help!*

Email us at AZUTRACS-Support@azdot.gov or call (602) 712-7761

- 1) After you log in, hover over “Contract Compliance” on the menu and choose “Bidders / Proposers List” from the drop down list.
- 2) Click “Start or Manage a Bidders/Proposers List”.
- 3) Select your firm from the available dropdown. You can only view firms that you are given access to as a Bidders/Proposers contact by the firm’s primary or secondary contact or if you are the primary/secondary contact yourself. See the [AZ UTRACS User Manual](#) or [Quick Tips for Gaining Access](#) for more information.
- 4) Once you select your firm, three buttons appear for you to choose from, depending on what you would like to do, “Create a New List”, “Continue an In-Process List” or “Open a Submitted List”. *
 - a. To create a “New” Bidders/Proposers list, click “Create a New List” and begin to type in the name or description of the project in the dropdown that appears to select the appropriate project.
 - i. Once the project is selected, a Registered Firms section appears. you can select any AZ UTRACS registered firm by selecting them from the dropdown list then clicking .
 - ii. If a firm is not listed in the Registered Firm dropdown, it means that they are not currently AZ UTRACS registered, which they should be. You can add an unregistered firm by providing their firm name, email address, phone number and clicking . Unregistered firms will receive an email prompting them to register in AZ UTRACS.
 - iii. Once the list is complete, click “Submit”. You will receive an email confirmation and the page will reset.
 - iv. If there are no subcontracting opportunities (meaning no firms need to be added to the list) find the project number and click submit.
 - b. To continue an “In-Process” list, select “Continue an In-Process List” and choose the project from the dropdown. You can add and delete firms and submit the list as described in step 4a above.
 - c. To review, copy or to resend the confirmation email for a previously submitted list, select “Open a Submitted List”
 - i. *If you would like to review a previously submitted list*, choose the project from the dropdown.
 - ii. *If you would like to copy one of your previous lists to your current Bidders/Proposers list*, select “Open a Submitted List”, click on the new project that you would like to copy to and select “Initiate Copy”. You can then proceed to add and remove firms and submit the list as described in step 4a above.
 - iii. *If you would like to resend the confirmation email to yourself*, chose the project from the dropdown and click .

Please note! Only customer support can recall a submitted bidders list. Once a bidders list is recalled it will be placed back in the “Continue an In-Process List” button, the original submittal will be invalidated. Once recalled, the firm will be able to make modifications and Resubmit the Bidders List. The list must be submitted again for the firm to successfully fulfill the Bidders List requirement. Contact us at (602)771-7761 or Email Customer Support at AZUTRACS-Support@azdot.gov

*You will be able to see a Bidders/Proposers list in any status created by anyone in your firm. The information will be displayed as follows: Project Number, Project Description, Bidders/Proposers list Status, Firm Member’s Email Address.



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How to Create and Manage Your Firm's Solicitation(s)



Firms Wishing to Submit a Solicitation:

- 1) After you log in, hover over "Contract Compliance" on the menu and choose "Solicitation Form" from the list.
- 2) Read the information and disclosures, and then click "Start or Manage a Solicitation Form".
- 3) Read the short acknowledgement about the Solicitation Form and click
- 4) Select your firm from the dropdown. You can only view firms that you are given access to as a Solicitation Form contact by the firm's primary or secondary contact or if you are the primary/secondary contact yourself. See the [AZ UTRACS User Manual](#) or [Quick Tips for Gaining Access](#) for more information.
- 5) Once you select your firm, three buttons appear for you to choose from, "Create a New Solicitation", "Continue an In-Process Solicitation" or "Open a Submitted Solicitation". **
 - a. To create a "New" Solicitation, click "Create a New Solicitation" and begin to type in the name or description of the project in the dropdown that appears to select the appropriate project.
 - i. Once the project is selected, a system message will appear. Click
 - ii. Once you click the first half of the Solicitation Form, the "Solicitation Details", will open up. This section contains information about the project for the Solicitation recipients. Fill out the mandatory asterisked (*) sections and any optional information, then select the Project County/Counties.
 - iii. Click and **read the information on the helpful tips**. Once you click the rest of the form will open. For more detailed instructions, watch the [instructional video](#) or see the [User Manual](#).
 - iv. Select criteria and create a result set for each type of work that you want to solicit bids/proposals for.
 - v. Type a custom message to the recipients.
 - vi. Choose from one of the buttons at the bottom of the form:
 1. "Save" will save the form. This is helpful so you can exit and return to the solicitation at a later time.
 2. "Submit for Approval" will submit the solicitation to AZ UTRACS Support for review and approval.
Please note! Once a Solicitation is approved, it cannot be recalled.
 3. "Preview" will show you an example of the email that the recipient firms will receive.
 4. "Delete" will delete the solicitation.
 - b. To continue an "In-Process" Solicitation, select "Continue an In-Process Solicitation" and choose the project from the dropdown.
 - c. To review, copy, download the list of recipients (approved solicitations only), or resend the confirmation email for a previously submitted Solicitation, select "Open a Submitted Solicitation"
 - i. *To review a previously submitted Solicitation*, choose the project from the dropdown.
 - ii. *To copy one of your previous Solicitation to a new Solicitation*, scroll to the bottom, click "Copy Into New Solicitation", click on the project that you would like to copy to, and select "Initiate Copy".
 - iii. *To download a list of the recipients*, scroll to the bottom and click "Export Recipients"
 - iv. *To resend the confirmation email to yourself*, scroll to the bottom and click "Resend Email".

Recipient Firms Wishing to Update Solicitations Received or Opt Out of Solicitations:

- 1) To update the type of solicitations that your firm receives, you should update your firm profile to reflect your current capabilities. See the [Quick Tips for Completing your Registration](#) for more information.

- 2) To opt out of receiving solicitations you should go to your firm profile and update the preferences for each contact under the "Firm Contact Information" section.



**You will be able to see a Solicitation Form in any status created by anyone in your firm. The information will be displayed as follows: Project Number, Project Description, Solicitation Status, Email Address, Date/Time of Last Update.

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