eTIP User Training
Part 1: Navigating eTIP and Submitting TIP changes

April 2017
Why are we here?

- The eTIP database has been in use about a year
- There are several new users in the region
- Database functions have evolved
Training Topics

- Accessing eTIP/User Credentials
- Home Page/Navigation
- Program and Project Versions
- Amendments and Amendment Reviews
- TIP Programming Form
- Other Project Forms
- Most Useful Reports
ACCESSING eTIP
Accessing eTIP

https://etip.cmap.illinois.gov/secure/
Accessing eTIP
Accessing eTIP

- Create and verify password
- Enter first and last name
- Enter phone number
- Select your agency
- Select your user type:
  - CFP (call for projects)
  - Read-only
  - Sponsor
  - CMAP
  - State/FHWA/FTA Approval of TIP
- CMAP staff will verify and set access rights for individuals

Password Requirements:
- Must be at least 7 characters in length
- Cannot be a word that is found in the dictionary
- Cannot contain your username
- Cannot contain the word “CMAP”
- Cannot be on the list of commonly used internet passwords

Submit New User Information
HOME PAGE AND NAVIGATION
Home Page and Navigation

- **User Guide**: Chapter 1
- **Main Navigation Bar**

1. Click the CMAP logo to return to eTIP home page
2. From the Project Tools menu you can access a list of your projects, or start an amendment or adoption
3. From the Reports menu you can access eTIP reports, such as an amendment summary or project listing
4. From the Other Tools menu you can update your password, view tutorials, go to the public site, or request technical help
5. The Project Status icons display the number of projects in each submittal category, and can be used to jump directly to projects of each status
6. The Quick Search by ID can be used to jump directly to a project, or projects, containing the entered ID numbers
7. Use Advanced Search to search by title, location, lead agency, and other fields
8. Click the logout icon to sign out of the eTIP database
In Progress Amendments are changes that you have started and saved, but not yet submitted to CMAP.

Submitted Amendments are those which you have submitted to CMAP for staff review and committee consideration.

In Progress Adoptions are new FFY changes you have started and saved, but not yet submitted to CMAP.

Submitted Adoptions are new FFY changes you have submitted to CMAP for committee consideration.

Indicates project changes In Progress which are not locked for editing.

Indicates project changes that were submitted to CMAP, but were denied, and need additional changes prior to committee consideration.

Indicates project changes Submitted to CMAP, which are pending staff review.

Indicates project changes Submitted to CMAP and accepted by staff for committee consideration.
Project Tools Menu

- My CFP List – Complete list of projects from the current CMAQ/TAP application cycle
- My Projects List – Complete list of approved project versions
- Amend TIP Projects – Start an amendment
- TIP Adoption – Start an adoption (annual Sept/Oct)
Reports Menu

• Table symbol: lines of filtered/sorted data
• Pdf symbol: formatted report (no download)
• $ symbol: financial data
• Chart symbol: other combinations
• Download symbol: raw data
Other Tools Menu

- All TIP Actions (amendment list, reports, approval dates)
- Change password
- Software tutorials (very general)
- Launch public site
- Email help desk (technical issues)
Icons, Searches, Logout

- Quick list of projects: in progress, denied, pending, accepted
- Quick search by ID (TIP, section, grant, etc.)
- Launch advanced search
- Logout
WORK FLOW, TIP ACTIONS, PROGRAM AND PROJECT VERSIONS
Program & Project Versions

- eTIP is workflow based
- Each “TIP Action” or “Document” is numbered
  - Approved program of projects, as amended
  - Corresponds to FFY and amendment number
- Each project has sequential versions
  - Every amendment adds a new project version
  - Versions have different status

eTIP Fact Sheet: [Project Versions and Status](#)
Mini-Session Topic: Monday, April 10 at 9:00 am
TIP Actions – Work Flow

- Changes are considered to be “In Progress” until they are “Submitted” to CMAP staff.
- Submitted changes will be “Pending” until reviewed.
- Staff will either accept or deny submitted changes.
- Only “Accepted” changes will be taken to committees for approval.
- Denied changes will include a reason for denial, and will move back to the “In Denied” section of “In Progress” changes.
Work Flow Notifications

• CMAP staff gets notified when…
  – New user requests access
  – User submits an amendment
  – User attaches a document

• Users get notified when…
  – CMAP approves access request
  – CMAP accepts/denies a change

Chicago Metropolitan Agency for Planning

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TIP Actions - Overview

• Adoption
  – Occurs once each year (Sept/Oct)
  – Carry forward projects into the new TIP document
  – Changes the “active” years of the TIP to correspond with start of federal fiscal year on Oct 1
  – Administrative changes only

• Amendments
  – Occur continuously throughout the year
  – Sequenced to CMAP’s committee schedule
  – 3 types: Administrative, Formal, Conformity
TIP Actions - Sequencing

- Numbered sequentially each FFY
  - Starting document for the FFY created via an “adoption”
- Amendments are grouped for staff management and committee action
- First formal amendment is “-01”
- Admin amendments are separated by processing agency: FHWA or FTA
  - First admin amendment for FHWA is “.1”
  - First admin amendment for FTA is “.2”
  - Additional admin amendments in sequence
- Second amendment group is “-02”

FFY 17 example
- 17-00
- 17-01
- 17-01.1
- 17-01.2
- 17-01.3, 17-01.4, etc.
- 17-02, 17-02.1, etc.
Project Versions & Status

• Each time a project is amended, a new version is created

A version is either the “Approved” version, or is a proposed amendment that is “In Progress”, “In Denied”, “Pending”, or “Accepted”.

<table>
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<tr>
<th>VERSION</th>
<th>TIP</th>
<th>PROJECT TITLE</th>
<th>STATUS</th>
<th>MPO APPROVAL</th>
<th>STATE APPROVAL</th>
<th>FTA APPROVAL</th>
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<tr>
<td>2</td>
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Determining Project Status

- My Projects List view (default for read-only) is always the latest version
- ID search or Advanced Search results will display status icon
- Project version and TIP Action displayed in project records
  - Version status displayed in yellow box
Individual Project Status

- Yellow message box displays the status of the record
- If not the approved version – provides a link
- For change review, provides a link to previous version
AMENDMENT TYPES & SCHEDULE
Amendment Types

- Administrative
  - FHWA
  - FTA
- Formal
- Conformity

See TIP Programmer Resources: TIP Quick Change Reference
Amendment Schedule

Corresponds to IDOT construction letting
  – Typically: January, March, April, June, August, September, November

• Transportation Committee (TC)
• 7 days public comment
• TIP Changes Due 10 days prior to TC

Conformity is semi-annual
  – Typically: March, October

• MPO Policy Committee
• TC review
• 30 days public comment
• TIP changes due approx. 3 months prior to Policy Committee
# Master Transportation Schedule

## 2017 Master Transportation Schedule

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Available on [TIP Programmer Resources](#) web page
Amendment Review Flow

- User submits for CMAP staff review
- Accepted Admin changes become Approved version
- Accepted Formal/Conformity changes go to committee(s)
- Committee approval triggers state review for inclusion in STIP
- State approval triggers federal review
- Federal approvals complete process and establish Approved version

eTIP Fact Sheet: Amendment Flow
Staff Review of TIP changes

- Staff views pending list – selects projects to review

Review changes, add comments, save/accept/deny
SUBMITTING AMENDMENTS
Submitting New Amendments

• Start by clicking on Amend TIP or selecting “Amend TIP Projects” from the Project Tools menu
• Select Amend/modify Project In ## TIP or Create New Project
• Select the type of Amendment: Administrative, Formal, or Formal Conformity
  – Refer to TIP Change Quick Reference
  – When in doubt, select “Formal”
Submitting New Amendments

- Search for the project you want to change
  (Hint: leave all fields blank, and click “Search” for a full list)
  – Projects with the [AMEND] link are eligible
  – Note any status icons that indicate changes in progress or submitted – do not start a new amendment!

- Make changes
- Save in progress
- Submit to CMAP for review
Making Additional Changes to Amendments/Adoptions In Progress

- View list of In Progress or In Denied projects by clicking on the home page link
- Click on TIP ID to open the project for additional changes
- Search for project by ID or Advanced
- Click on the status icon (not TIP ID)
- Must be In Progress or Denied to edit

- When all are complete, with no errors indicated, submit to CMAP
Making Additional Changes to Submitted Amendments/Adoptions

- View list of Pending or Accepted by clicking on the home page link
- Check the box at the far right of the project line, then click the Unsubmit button at the top of the page
  - Project will now be included in the In Progress list
  - Open that list or quick search by ID to open project
PROJECT INFORMATION: TIP PROGRAMMING FORM
Project Information

• Existing project records have 6 pages:
  – TIP Programming (project description and funding)
  – Obligation (FHWA’s FMIS database info – updated nightly)
  – Map (project location – tools to draw and measure)
  – Project IDs (enter various IDs for project to populate TIP Programming drop-downs)
  – Documents (attach documents related to the project)
  – Amendment History (log of changes to the project)
• New projects are a single page until saved for the first time
• Refer to eTIP User Guide Chapter 2 for details
• Mini-Session Topic: Friday, April 14 at 9:00 am
TIP Programming tab

• Administrative Area (CMAP staff use)
• Project Information
  – Title, Description, Scope, Contact, Location(s)
• Programming Information
  – Current and Prior funding lines
  – Funding History
  – Subtotals by Year, Fund Source, and Phase
• Project Questions (Extra information)
• Change Reason (Documents changes for staff review and committee actions)
TIP Programming – Admin Area

• Shows the TIP Action (15-01, 16-00, etc.)
• Shows project status related to Air Quality
  – Exempt Status
  – Conformity Status
TIP Programming – Project Information (Description)

• Project Title: Plain English, public friendly description of the where (or what) of project
• Project Description: Plain English, public friendly description of the work being done
• Project Type: Overall major theme
• Work Type: Select all appropriate. Determines exempt/conformity status
• Major Imp Group: Indicates Long Range Plan status. Default is “None”
• Open to Traffic: The year project will be complete and “open” for use by the public
TIP Programming – Project Information (Contact/County/Muni)

- Lead Agency: The agency responsible for the project in the TIP
- County: The county(s) in which the project is located
- Municipality: The municipality(s) in which the project is located
- Project website: If applicable, so the public can learn more
- Primary Contact: Who CMAP should contact about the programming of project
- Public Contact: Who the public should contact

Hint: You must complete a new project through this section of form before saving in order to have a TIP ID assigned!
TIP Programming – Location

- Difference between # Hwy and Local Road
- Bike/ped
- Non-traditional projects: Relationship between system and financials
- “Is modeling?”
- Multiple location lines (in general and modeling)
- Using map tool/other sources for location info
- Remember to map all locations (including selecting bridges) that are included in this section and to update the map if you make a change in the future
TIP Programming – Financial

- Federal FYs
- One line per source/phase (except C/CE) – as appropriate for authorization/spending of funds
- Every federal line must have a corresponding match line
- Adding line item specific IDs
  - Must establish (save) line items first
  - Drop-downs populated from IDs tab
- Assigning line items to segments or sub-projects
  - Must establish (save) line items first
  - Drop-downs populated from IDs tab
  - Helps reviewers (IDOT, FHWA, FTA) identify and verify
TIP Programming – Project Questions

- Track project combos/splits
- Identify related projects
- Track project elements that address regional priorities (ITS, Freight, etc.)
TIP Programming – Change Reasons

• Select ALL that apply
• Why is this important?
  • Alerts staff what to review
  • Alerts review agencies
  • Increases public transparency (displayed on amendment reports)
  • Track trends over time
• Other reason vs. narrative
  • Other Reason should be short – this is visible to public
  • Narrative – explains to CMAP and review agencies anything out of the ordinary about change
• Additions to the list coming soon!
TIP Programming – Schedule

• New section coming soon!
• Suggested by users, supported by FHWA
• Will be used to:
  • generate reports of upcoming projects
  • identify projects needing action in near term
  • predict timeframes for meeting performance targets
PROJECT INFORMATION: MAP
Map – Overview

- Google maps background
  - Google search for address, city, etc.
  - Zoom in/out
  - Map, satellite, and street views

- Separate Roads++ and Bikeways layers

- Custom tools
  - Select features
  - Create nodes
  - Measure
  - Adjust segments

- Mini-Session Topic: Monday, April 10 at 1:30 pm
Map – Required Projects

• All projects must be mapped, except:
  – Transit projects are auto-map based on selected line(s)
  – New roads/extensions that do not exist
  – Various locations that are not defined, or too numerous to make sense
  – Off-road bike/ped that are not part of regional system
  – Vehicles, operations, non-infrastructure

• If can’t map project in eTIP, attach documents showing location
Map - Layers

• Roads Layer
  – Highway Segments: IDOT IRIS segments (line)
  – Intersection Nodes: IDOT IRIS points (square)
  – Bridges/Structures: IDOT ISIS points (triangle)
  – Transit Stops and Stations: CMAP modified service board data (circles) – omitted within 500’ of intersections
  – Rail Stations, Yards, Crossings: CMAP data (circles) – omitted within 500’ of intersections

• Bikeways Layer
  – Regional Greenways & Trails Plan (2009) line segments
Map - Symbols
Map – Zooming In

- Auto-zoom to general area based on first location line (if possible)
- Use address search box (Google maps based)
- Select layer
- Zoom in until segments/features appear
- In areas with short segments, zoom in further
Map – Selecting Roads

• Click on each individual segment
• Generally segmented by changes in roadway characteristics (median, pavement, speed, etc.)
• Watch for short segments (especially around intersections, interchanges, and bridges) – don’t leave gaps!
Map – Selecting Intersections

• For facilities/projects that also have additional work at specific intersections, select the segments and intersections within those limits

• For intersections that have work beyond the intersection, select the intersection(s) and the continuing segment(s)
Map – Selecting Bridges

• Locations may not appear logical (structure end)
• IDOT website: locations same as eTIP – check description to verify
  http://apps.dot.illinois.gov/bridgesinfosystem
Map – Selecting Transit/Rail points
Map – Selecting Bikeways

• On/Near Road: Select Road
• Off-Road: Select from Bikeways layer
  – If not included, attach a map on the documents tab
Map – Adjusting Segments or Adding Nodes
Map - Measuring

- Use to complete length fields on TIP Programming form
- Remember for distances shown in feet on the map, divide by 5,280 to calculate miles
Map – Do’s and Don’t’s

• Do update the map if you’ve changed the information in the Location section of the TIP Programming form
• Do zoom in enough to prevent leaving gaps
• Do adjust segment endpoints and add nodes where appropriate
• Do select all locations described on the TIP Programming tab
  – Segments
  – Intersections
  – Bridges/Structures
• Don’t select every intersection for linear projects, only those with specific work
• Don’t select adjacent segments for projects “at” an intersection
Map – Other notes

- Maps can be added/updated at any time and are not an amendment
- Maps must be saved on the Map tab
- Maps are included in the public site project overview and amendment reports
PROJECT INFORMATION:
PROJECT IDs
Project IDs

- Different numbers important to different users
- Searchable from home page, etc. only if entered and in correct format
- Project website
- Segments, sections, stages, sub-projects, etc.
- Used to populate drop-down menus on TIP Programming form
- Update and save at any time
- Not an amendment until associated with individual financial line items
## Project IDs

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### Project Alternative IDs

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<td>Section #</td>
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### Contact CMAP

- Email: ETIPHELP@ECOINTERACTIVE.COM

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<tr>
<td>S8</td>
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Project IDs - Format

- Separate with commas (,)
- State Job Number: X-##-###-##
- Federal Project Number: ###### leave out prefix letters, dashes, parentheses
  - ACM-6000(448) is entered as 6000448
  - CMM-00D1(664) is entered as 00D1664
- All others include numbers, letters, and symbols
- Website: leave out http://
Project Information: Documents
Documents - overview

- eTIP is a place to store project-related documents
  - Cost changes/estimates
  - IDOT Forms
  - Project information (especially if the description/location is not clear in the TIP Programming form)
  - Project Milestones
  - Public Involvement/Media Coverage
- Helps State and Federal review agencies better understand the project and can speed up approvals
- Mini-Session Topic: Monday, April 10 at 1:30 pm
Documents - overview

- Anyone can attach files related to projects
- Can only delete files you uploaded
  - (X to right of file)
- Technical, applications, correspondence, media/public info.
- Currently only available to view on secure site – select files on public site in future
## Documents - Viewing

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<td>Grant Davis</td>
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</table>
Documents – Uploading

• Click on Cloud icon
• Enter the document date
• Enter short description or file name
• Select the type of document
• Click “Choose File” to open your computer’s files
• Repeat for up to 6 files at a time
• Click “Upload Selected” to attach
• Wait until the screen refreshes before moving on
Documents - Uploading

Upload Project Documents

Enter a description and then select the document you want to upload by clicking on the "Choose File" button.
PROJECT INFORMATION: AMENDMENT HISTORY
Amendment History

- Lists project versions with link to view
- Can show historical project history from prior database
PROJECT INFORMATION: OBLIGATIONS
Obligations

- FHWA funding only (No FTA, state, local)
- Three sections:
  - Obligation Data: overview of obligations, including AC by FFY
  - Obligated Detail (hidden by default): detailed transactions, including expenditures
  - FMIS Code Summary (hidden by default): project totals by FMIS program code, including obligations and expenditures
- Relies on matching either Federal Project Number or State Job Number in FMIS with data in eTIP.
- Mini-Session Topic: Thursday, April 13 at 11:00 am
Obligation Data

- Shows programming vs. obligations
- Easy to see where programming and obligations don’t match
- Shows AC conversions
## Obligated Detail

<table>
<thead>
<tr>
<th>Date</th>
<th>FFY</th>
<th>FED_ID</th>
<th>Description</th>
<th>Category</th>
<th>Codes</th>
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<th>Oblig Ac</th>
<th>Expended</th>
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<td>10/12/2010</td>
<td>2011</td>
<td>0033100</td>
<td>Phase I preliminary engineering of Franklinville Rd. @ Tributary of Kishwaukee River 0.1 mi S.of Perkins STP Rd.</td>
<td>L1CO - (Bridge) HBP</td>
<td>$0.00</td>
<td>$157,649.00</td>
<td>$0.00</td>
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</tr>
<tr>
<td>07/09/2014</td>
<td>2014</td>
<td>0033101</td>
<td>Phase II preliminary eng for removal of existing structure &amp; design of new relocated structure on Franklinville Rd over Trib.*</td>
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<td>L1CO - (Bridge) HBP</td>
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<td>07/21/2014</td>
<td>2014</td>
<td>0033100</td>
<td>Phase I preliminary engineering of Franklinville Rd. @ Tributary of Kishwaukee River 0.1 mi S.of Perkins STP Rd.</td>
<td>L1CE - (Bridge) HBP</td>
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<td>$0.00</td>
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<td>2015</td>
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<td>Replace the bridge carrying Tr.32 (Noe Rd.) over a tributary to the Kishwaukee River, located 0.06 mi S.of Perkins Rd. **</td>
<td>TE/TA</td>
<td>M2E2 - STP</td>
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<td>05/01/2015</td>
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<td>0033100</td>
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<td>L1CE - (Bridge) HBP</td>
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<td>Replace the bridge carrying Tr.32 (Noe Rd.) over a tributary to the Kishwaukee River, located 0.06 mi S.of Perkins Rd. **</td>
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<td>TE/TA</td>
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<td>03/22/2016</td>
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<td>0033102</td>
<td>Replace the bridge carrying Tr.32 (Noe Rd.) over a tributary to the Kishwaukee River, located 0.06 mi S.of Perkins Rd. **</td>
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## FMIS Code Summary

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<th>UNEXPENDED</th>
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- At-a-glance project totals by FMIS code
- Expected to be more useful to state/federal partners than to CMAP/Local Agencies
Obligations - Overview

- Nightly upload of data from FHWA’s FMIS database
- Only for federal funds through FHWA
- Depends on matching Federal Project and/or State Job number in eTIP with same in FMIS
- Summary by FFY: compare TIP program to FMIS
- Detailed transactions
- Summary by federal fund code
Obligations – FFY Summary

- Rolled up by FFY
- At-a-glance comparison of TIP program and FHWA obligations, authorizations, and expenditures
- Left side is TIP program data
- Right side is FMIS data
Obligations – TIP Data

- **TIP Funds**: What federal source(s) and phase(s) are included in the TIP
- **TIP $**: The amount programmed in the TIP, including ACC
- **TIP AC $**: The amount in AC in the TIP
Obligations – FMIS Data

- Obligated Funds: The FHWA fund source(s) obligated, authorized, or expended
- Obligated: The amount of funds obligated (new or ACC)
- Unobligated: The difference between TIP $ and Obligated
- Auth AC: The amount of funds authorized in AC
- Expended: The amount of funds expended (paid to the state by FHWA)

<table>
<thead>
<tr>
<th>FFY</th>
<th>OBLIGATED FUNDS</th>
<th>OBLIGATED</th>
<th>UNOBLIGATED</th>
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<td></td>
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Obligations – Detail

<table>
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<tr>
<th>DATE</th>
<th>FFY</th>
<th>FED. ID</th>
<th>STATE ID</th>
<th>DESCRIPTION</th>
<th>CATEGORY</th>
<th>CODES</th>
<th>OBLIGATED</th>
<th>AUTH AC</th>
<th>EXPENDED</th>
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<td>12/22/2015</td>
<td>2015</td>
<td>4003584</td>
<td>D-91-043-16</td>
<td>Phase II preliminary engineering for the design and plan development for proposed roadway resurfacing and pedestrian improvements on Glenview Road from Harlem Avenue to Waukegan Road. Route: FAU 1297</td>
<td>STP</td>
<td>M23E - STP</td>
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<td>$0.00</td>
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<tr>
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<td>2016</td>
<td>4003584</td>
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<td>09/20/2016</td>
<td>2016</td>
<td>4003584</td>
<td>D-91-043-16</td>
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<td>STP</td>
<td>M23E - STP</td>
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<tr>
<td>01/19/2017</td>
<td>2017</td>
<td>4003585</td>
<td>C-91-043-16</td>
<td>RESURFACING FAU 1297 (GLENVIEW ROAD) FROM RAILROAD AVE. TO WAUKEGAN RD. IN THE VILLAGE OF GLENVIEW PROJECT CONTAINS CURB &amp; GUTTER REPLACEMENT, SIDEWALK REPLACEMENT, TRAFFIC SIGNALS, LIGHTING, WATER MAIN AND LANDSCAPING.</td>
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<td>NATIONAL HIGHWAY PERF PLAN</td>
<td>Z001 - NATIONAL HIGHWAY PERF FAST</td>
<td>$0.00</td>
<td>$106,195.00</td>
<td>$0.00</td>
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<tr>
<td>03/03/2017</td>
<td>2017</td>
<td>4003584</td>
<td>D-91-043-16</td>
<td>Phase II preliminary engineering for the design and plan development for proposed roadway resurfacing and pedestrian improvements on Glenview Road from Harlem Avenue to Waukegan Road. Route: FAU 1297</td>
<td>NATIONAL HIGHWAY PERF PLAN</td>
<td>Z001 - NATIONAL HIGHWAY PERF FAST</td>
<td>$106,195.00</td>
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GRAND TOTAL: $106,195.00 $1,668,866.00 $0.00

Chicago Metropolitan Agency for Planning
<table>
<thead>
<tr>
<th>Obligated Detail - FMIS Last Imported: 03/28/2017</th>
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<tr>
<td><strong>Obligations – By Fed ID</strong></td>
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<th>TIP</th>
<th>FED ID</th>
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<th>CODES</th>
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<th>AUTH AC</th>
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<td>17-05.1</td>
<td>4003584</td>
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<td>Phase I preliminary engineering for the design and plan development for proposed roadway resurfacing and pedestrian improvements on Glenview Road from Harlem Avenue to Waukegan Road, Route: FAU 1297</td>
<td>M23E - STP</td>
<td>$0.00</td>
<td>$106,195.00</td>
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<tr>
<td>92-12-0013</td>
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<td>4003584</td>
<td>D-91-043-16</td>
<td>Phase II preliminary engineering for the design and plan development for proposed roadway resurfacing and pedestrian improvements on Glenview Road from Harlem Avenue to Waukegan Road, Route: FAU 1297</td>
<td>NATIONAL HIGHWAY PERF PLAN Z001 - NATIONAL HIGHWAY PERF FAST</td>
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<td>$106,195.00</td>
<td>$0.00</td>
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**2016 SUBTOTAL**

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<th>TIP</th>
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<th>AUTH AC</th>
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<tr>
<td>92-12-0013</td>
<td>17-05.1</td>
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<td>Phase II preliminary engineering for the design and plan development for proposed roadway resurfacing and pedestrian improvements on Glenview Road from Harlem Avenue to Waukegan Road, Route: FAU 1297</td>
<td>NATIONAL HIGHWAY PERF PLAN Z001 - NATIONAL HIGHWAY PERF FAST</td>
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<td>NATIONAL HIGHWAY PERF PLAN Z001 - NATIONAL HIGHWAY PERF FAST</td>
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<td>$0.00</td>
<td>$0.00</td>
<td>3/3/2017</td>
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</table>

**2017 SUBTOTAL**

**TOTAL**

$106,195.00 $0.00 $0.00
Obligations – FMIS Summary

- Not really used by CMAP or programmers at this time
- Displays obligated (not including AC), expended, and unexpended funds for all years

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<thead>
<tr>
<th>FMIS Code Summary</th>
<th>Show/Hide</th>
<th>Historical Show/Hide</th>
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<td>$189,260</td>
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</table>

Chicago Metropolitan Agency for Planning
REPORTS
Report Filters

• Standard filtering for most reports
  – TIP Action: Include amendments? Include pending changes?
  – Funding Type: Default ALL, can select one or many
  – Limit to a certain: Project Type, Lead Agency, and/or County

• Some reports have additional display options
Report Features

- Sort by single field by clicking on the column title (most reports)
- Drill-down to additional information by clicking on row label (including subtotals and grand totals)
  - Varies by report
  - Typically to a list of projects or line items that are contributing to the information you’re viewing
- Open project records by clicking on TIP ID (Hint: right-click to “open in a new tab” so you don’t have to re-run the report)
- Export to Excel
Useful Reports

• Fiscal Constraint
  – By Agency
  – By Region
• $ Programmed By Fund
• Line Items
Financial Constraint Reports

- Two Versions:
  - Agency Financial Constraints (certain FTA funds, STP-L)
  - (Regional) Financial Constraints (all others)
- Standard TIP Action and Status selections
- Standard filters
- Options: Show Balance Detail, Show All Funds
- Recommended Option: Show Balance Detail
- Drill-downs
- Export to Excel
- Mini-Session Topic: Thursday, April 13 at 9:00 am
Financial Constraint Reports
Agency Revenue and Balance Detail

• Fields: Prior (programmed), Revenue Carried Over, Revenue, Programmed, Balance
• Duplicate fund lines with (AC) show how much additional is programmed in Advance Construction
• Drill-Downs
  – Click on agency name in each source group to view list of agency’s projects with that source
  – Click on fund source subtotal link for a list of all projects with that source
  – List includes indication of ACC
  – From project list, click ID to open project
# Financial Constraint Reports

## Agency Revenue and Balance Detail

### $ Agency Financial Constraints

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<th>PROGRAM DESCRIPTION</th>
<th>PRIOR CARRY-OVER</th>
<th>REV 2017</th>
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Chicago Metropolitan Agency for Planning
Financial Constraint Reports
Agency Revenue and Balance Detail

$ Agency Financial Constraints

REVENUE DATE: 17TIP 09/19/2016
INCLUDE TIP ACTIONS: Please click here to select..
INCLUDE PROJECTS WITH STATUS: Accepted

Limit results by:
PROJECT TYPE: 

LEAD AGENCY:
DuPage Council

COUNTY:

CONTACT CMAP:

Email: ETIPHELP@ECOINTERACTIVE.COM

Chicago Metropolitan Agency for Planning
## Financial Constraint Reports
### Agency Revenue and Balance Detail

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<th>Program Description</th>
<th>PRIOR</th>
<th>REV 2017 Carry-Over</th>
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<th>TOTAL PROG 2017</th>
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CONTACT CMAP

[Chicago Metropolitan Agency for Planning](http://www.cmap.com)
Financial Constraint Reports
(Regional) Revenue and Balance Detail

• Fields: Same as Agency Report
• Amounts are for the entire region.
  – Revenues are sum of individual agencies’ amounts
  – Programmed captures all projects from all agencies
• Drill-downs
  – Click on fund source to view list of projects with that source
  – List includes indication of ACC
  – From project list, click ID to open project
Financial Constraint (Region)

- Carryover + Allotment
- Funds in AC shown separately – not constrained
- Balance “rolls forward” to next FFY
- Click fund source to drill-down to a list of projects
- Reset each FFY using admin forms
Financial Constraint Reports
Show All Funds

- Fields: Same as others
- Amounts are for the entire region or selected agencies
- Includes sources that are not constrained: state, local, other
- Drill-downs
  - Click on fund source to view list of projects with that source
  - List includes indication of ACC
  - From project list, click ID to open project
Programmed By Fund

- Standard TIP Action and Status selections
- Funding type: Multi-select individual sources or groups of sources. Default is “ALL”
- Standard filters
- Options: By FY, By FY & Phase, Only Totals
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Chicago Metropolitan Agency for Planning
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### By FY & Phase

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$ Programmed By Fund
Only Totals

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Line Items Report

• Standard TIP Action and Status selections
• Funding type: Multi-select individual sources or groups of sources. Default is “ALL”
• Standard filters
• No additional options
# Line Items Report

- Each financial line
- Includes IDs associated with lines
- Latest amendment version (that meets selected criteria)

<table>
<thead>
<tr>
<th>Line Items Report</th>
<th>60 PROJECTS LISTED</th>
<th>PRINTER FRIENDLY</th>
<th>EXPORT TO EXCEL</th>
</tr>
</thead>
<tbody>
<tr>
<td>TIP ID</td>
<td>TIP</td>
<td>TITLE</td>
<td>LEAD AGENCY</td>
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<tr>
<td>10-03-0099</td>
<td>17-00</td>
<td>Dugdale Rd from Jackson St to 14th Street</td>
<td>Lake Co Council</td>
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GETTING HELP
Q&A
Additional Training

- eTIP Training Part 2: Finding and Using Project Information | Friday, April 7 at 9:00 am
- Mini-Sessions
  - Understanding Program, Project, and Amendment Versions and Status | Monday, April 10 at 9:00 am
  - Using the eTIP Public Website | Monday, April 10 at 10:30 am
  - Mapping Projects and Attaching Documents | Monday, April 10 at 1:30 pm
  - Generating, Reading, and Understanding Financial Constraint Reports | Thursday, April 13 at 9:00 am
  - Understanding Obligation Information (for non-transit users) | Thursday, April 13 at 11:00 am
  - Completing the TIP Programming Form | Friday, April 14 at 9:00 am
- Review Agency Training | TBD in Springfield
Getting Help - CMAP

• CMAP Staff
  Kama Dobbs | 312-386-8710 | kdobbs@cmap.illinois.gov
  Teri Dixon | 312-386-8754 | tdixon@cmap.illinois.gov
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  Barbara Zubek | 312-386-8836 | bzubek@cmap.illinois.gov

• CMAP website: TIP Programmer Resources
  http://www.cmap.illinois.gov/programs-and-resources/tip/tip-programmer-resources