

# **Assigning External Users**

#### Introduction

ROWAPS Consultants and Utility Coordinator Consultants may gain access to Right of Way (ROW) and Utility projects in TxDOTCONNECT. However, they must first gain access to TxDOTCONNECT and be assigned to the project by an internal TxDOT user, such as a ROW Project Manager or Utility Coordinator.

This job aid describes the process for assigning external Right of Way and Utilities users to a project in TxDOTCONNECT.

#### **Process Overview**

To assign an external user to a project, the external Consultant user (e.g., ROWAPS Consultant, Utilit Coordinator Consultant) and an internal TXDOT user (e.g., ROW Project Manager, Utility Coordinator) must coordinate to complete each step in the process. Each of these steps are described in greater detail in the following pages.

- 1. The Consultant requests and gains access to TxDOTCONNECT.
- 2. TxDOT creates an Organization profile for the Consultant (if not already present).
- 3. TxDOT assigns the Consultant's Organization to the project's Right of Way page.
- 4. TxDOT assigns the Consultant user on the project's Resources page.

The Consultant user can now search for and edit the project in TxDOTCONNECT.



- If only step 1 of this process if followed, the Consultant will be able to log in to TxDOTCONNECT but will not be able to search for or edit projects.
- The External Resource Assignment feature on the project's Resources page only allows assignment of an external ROW user who is recognized as a supporting resource for an Organization assigned on the project's Right of Way page.





# 1. The Consultant Requests and Gains Access to TxDOTCONNECT

To request access to TxDOTCONNECT, the Consultant should follow the instructions for ROWAPS, Utility, and Surveyor Consultants as described on the <a href="mailto:TxDOTCONNECT Access for Consultants and External Partners">TxDOTCONNECT Access for Consultants and External Partners</a> page on TxDOT.gov. These steps are described below.

- 1. Complete Form P-ITD-ISO-025-1.
- 2. Complete 1980-ROW (ROW-IR-TC).
- 3. Email both completed forms to the ROW Applications Help Desk at:

ROW\_Applications\_Helpdesk@txdot.gov

4. Once credentials are received via email, complete multi-factor authentication.







1980-ROW (ROW-IR-TC)



If only this step of the process is followed, the Consultant will be able to log in to TxDOTCONNECT but will not be able to search for or edit projects.



#### 2. TxDOT Creates an Organization Profile for the Consultant

The next step in the process is to create an Organization profile for the Consultant and ensure the consultant and their User ID are included in the Organization's Supporting Resource information.



The External Resource Assignment feature on the project's Resources page only allows assignment of an external ROW user who is recognized as a supporting resource for an Organization assigned on the project's Right of Way page.

If there is already an Organization profile for the Consultant in TxDOTCONNECT, the Consultant must still be added as a **Supporting Resource**. Skip to step 5 on the next page.

To create a new organization, follow the process described in the <u>Creating Organizations</u> job aid. A brief description of this process is included below.



Always search in TxDOTCONNECT to make sure an Organization profile does not already exist before you create a new one.

- 1. Click the Administrative module in the top menu bar.
- 2. Select Create Organization.
- 3. Indicate whether the organization already has a Texas Identification Number (TINS).
- 4. Complete the sections of the Create Organization page:
  - Header
  - Organization Information
  - Contact Information
  - Address
  - Certification



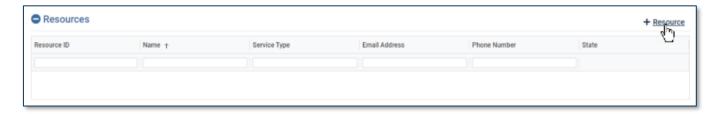
Select Organization Type: Supplier. This is required in order to assign the correct Service Type for the Supporting Resource.







To add the consultant as a Supporting Resource for the Organization,



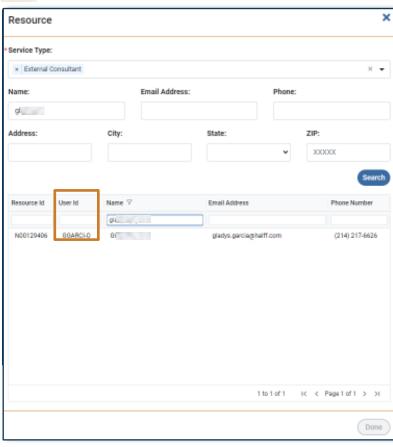
5. Click + Resource.

The Resource window appears.

- 6. Select Service Type: External Consultant
- † This is only available for Organization Type: Supplier.
- Enter at least one field of identifying information (for example, Name).
- 8. Click Search.
- The Consultant appears in the search results, and the external consultants need to be added as a resource to the organization with their -O User ID.
- 9. Select the Consultant.
- Complete any additional desired information.
- 11. Click Done.

The Consultant appears in the Resources table.

- 12. Complete all remaining relevant information about the Organization.
- 13. Click Save.







# 3. TxDOT Assigns the Organization to the Project

The next step is to assign the Consultant's Organization on the project's Right of Way page.



The External Resource Assignment feature on the project's Resources page only allows assignment of an external ROW user who is recognized as a supporting resource for an Organization assigned on the project's Right of Way page.

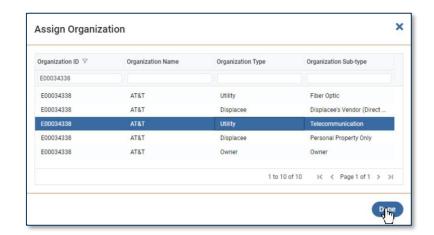
To assign an organization to a project's ROW page, follow the process described in the <u>Assigning Tasks</u> & <u>Organizations</u> job aid. A brief description of this process is included below.

- Navigate to the Organization
   Assignment (ROW) section of the project's Right of Way page.
- 2. Click + Organization.

The Assign Organization window appears.

- 3. Filter the list by:
  - Organization ID
  - Organization Name
  - Organization Type
  - Organization Sub-Type
- 4. Select an Organization.
- 5. Click Done.

The Organization appears in the Organization Assignment (ROW) table.





6. Click Save Project.





# 4. TxDOT assigns the Consultant on the Resources page

The next step is to assign the Consultant on the project's **Resources** page. This will grant the Consultant access to the project – they will be able to search for and edit the project.



The External Resource Assignment feature on the project's Resources page only allows assignment of an external ROW user who is recognized as a supporting resource for an Organization assigned on the project's Right of Way page.

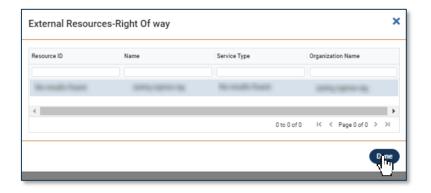
To assign an external user, follow the steps below.



- 1. Navigate to the External User Assignment section of the project's Resources page.
- 2. Click + Resource.
- 3. Select Right of way.

The External Resources-Right of way window appears.

- 4. Filter the list by:
  - Resource ID
  - Name
  - Service Type
  - Organization Name
- 5. Click Done.





The Consultant appears in the External Resource Assignment table.

6. Click Save Project.



