


Tips on Using the ADOT HPT Portal

June 25, 2020

1. **Once logged in to the Citrix virtual desktop, the web address for the HPT Portal is**
<http://adotnetapp/hptportal/>.

2. **Map Application:** Remember to activate the layers you want to use in the Options box, and remember to use the Identify tool with the right layer selected (it asks you which layer to identify from). Some layers can only be active at certain zoom levels, so if something doesn't seem to be in the list, zoom in. **NOTE:** *There are several new map layers in the Portal in the new release, June 2018). You will find Fraser Bridges, (Other) Bridges, and Cultural Reports. Check them out!*. The map application is great for:
 - A. Tracking down mileposts, and measuring to or from mileposts;
 - B. Determining what USGS quads cover your project area;
 - C. Determining section, township, range info;
 - D. Determining land ownership, BLM Field Offices, and tribal land boundaries;
 - E. Determining Tribal Claims Areas (very important!); zoom in for this information, and map will bounce out again with selection; hover over a tribe in the list and map will highlight the TCA; make a list and go to the Contacts list to follow up;
 - F. Using different base maps to see topos, aeriels, and a variety of other options: explore them!
 - G. "ADOT Projects" layer may give some helpful information, like TRACS numbers, but it's dated;
 - H. "Archived Surveys" has been removed and replaced with "Cultural Reports", which is not complete but covers a good deal of the state. You will find ASM project numbers (if assigned), TRACS numbers (if assigned), and report names with author and date. Any report listed here is available on the Portal for download.
 - I. "Bridges": layer has been corrected and now gives you a correct location (wow!) with structure number needed for further research. Use this in concert with the Historic Fraser Bridges layer (see below).
 - J. "Historic Fraser Bridges" comes directly from the Fraser inventory table but we have noticed a few errors in structure numbers. Please verify the structure number with the Bridges layer (above) to make sure you're considering the right bridge. It will give you the year built and National Register eligibility per the inventory.

3. **Use the portal flexibly.** Search the "Documents/Letters" as there is more data in documents than in the map application itself when you are looking for reports and/or consultation letters.
 - A. Search for documents by route and milepost (use the map to find this if you don't have it already).
 - B. Search by titles (just a portion of the title will work, like name of the highway or project area).
 - C. If you know of a specific report, try the author name and county.
 - D. If you need site information, which is still sadly lacking in the map application, look for reports in your area, which can provide lots of field information.
 - E. Search the site number in "Documents" titles.
 - F. Search Results list always defaults to 10 per page: you can change the "Items per Page" at the bottom of the list, up to 200.

- G. Linked letters/docs are now listed in a new popup window. You will see a magnifying glass  in the Links column if there are any linked docs or letters. Click on the magnifying glass to see this.
- H. Multiple letters can be selected and opened or downloaded at the same time from this window.
- I. Note that you can change the order of the listings at the top of each column by clicking on the underlined column headers; this helps when looking for a particular date.
- J. Also note that if you adjust the width of the window on your desktop, you can change the width of the columns. This will often make it easier to see the list (especially of Linked Letters) more neatly stacked and easier to read.
- K. Remember that uploaded docs in the Portal are the result of a few mass uploads and many individual uploads: the information listed may be incomplete (or even incorrect!). TRACS numbers may be missing, route/milepost info may be missing, dates seem to be missing quite often; that's why you need to search flexibly. Try a different approach if the first one doesn't yield results. Editing and cleaning up the portal listings is an ongoing process;
- L. Explore the other options: there are many ways to dive into the portal!

4. Be sure to click on "Clear Search Criteria" in between searches, as it sometimes gets confused.

5. Contacts List: one of the best resources in the HPT Portal!

- A. Once you've tracked down your tribal/agency consulting parties on the map, the Contacts list will tell you exactly who to address the original letter to, who to copy to, whether they want electronic correspondence; list has addresses, emails and phone numbers.
- B. Read the consultation protocols: this will tell you exactly how to proceed, and how to get the consultation letters prepared correctly (ask your HPT Specialist for help if you are unsure of something).
- C. If you check the "Mailing Format" box, the listing changes to a format that you can copy and paste into your documents (eliminates everything except specified address info). This can speed things up. I note that sometimes the check box seems to reverse the format, so click on and off until you see what you need.
- D. The contact information is an ongoing, constant process, so check it for each project; if you know of changes at an agency or tribe, please let me know.

6. Uploads:

- A. Warning added June 2020: **AVOID use of apostrophes**. The Portal software really doesn't like them and they cause errors. It is a sad state of affairs, but enter Homolovi, not Homol'ovi, OHara, not O'Hara, Tohono Oodham, not Tohono O'odham. I know there are many tribal place names (and others) where there are apostrophes; just for the Portal, please do not enter them.
- B. Remember that **uploading of documents at end of a project cycle MUST be done**, either by consultant or by HPT specialist. If they aren't getting into the Portal, they aren't going to be useful to anyone else. This is a basic responsibility!
- C. Before you upload, check Portal to see if docs have already been uploaded by someone else. Yes, it's just possible that this might have happened. No point in duplicates.
- D. **First, upload only pdf copies of reports and signed responses to consultation**, not all of the original Word documents. Most signed responses are pdfs already. If you receive a response in the mail, scan it to pdf first (as you would for your own files), and upload the pdf. **Don't upload CIFs of**

closeout memos unless the memo is the only document available which describes the work done, as when PA used and no letters written.

- E. For report titles, it's helpful to add report numbers (helps to pinpoint a search), and if it's a revision or not. These are not necessary but very helpful. Lots of these report titles sound alike.
- F. Remember to link reports and letters: if you forget to do this at first, you can go back to "Edit Document" and link your letters, or even add TRACS numbers or anything else. If you upload the report first and then go straight to uploading the letters, they will automatically be linked. When finished checked your report entry to make sure the right letters are linked.
- G. Be sure to upload your reports as the correct document type. There are several options, and not everything is a survey. Please pay attention to your details.
- H. **Then, study previous upload "titles" especially for letters.** Figure out what will work if someone is searching for your letter (or how you would be searching for it). Make it relevant, not just **SHPO_concurrence** or **SHPO_letter**: concurrence on what? Which SHPO letter?
- I. There's not a set formula for this but keep it short and simple, trying to keep them all the same length (makes it easier to find them later, see 3G above). Remember that the text boxes in the Portal are only so long and we want to get to the point in a short space.
- J. Generally use something like "**H7245 Init106 NHPA SHPO 7-5-16**" or "**H7245 Contg106 NAE BLM 7-6-14**". **Figure out what is important about your letter: TRACS number or LPA number, phase of work (Init or Contg or ScopeChg or...), consulting party (abbreviate except certain tribes (use SanCarlos, not SCAT), date of concurrence.** No need for "consultation" or "concurrence" as that is what all of these letters are about: if it is a Do-Not-Concur letter, say "NoConcur" or "Comments" or "Cmts", otherwise assume it is a concurrence. For PA memos use something like "**Hxxx PA Stip X.c.1 [date]**".
- K. In the "Letter Date" box, put the concurrence date. An error in the initial instructions years ago told us to put the date of concurrence signing, though this should have been the original letter date, which makes more sense. Let's at least be consistent in the error.
- L. **DO NOT upload multiple copies of one letter, even if it is consultation for more than one report and has multiple locations.** Instead, for the same letter, list multiple locations in the "Area Covered by Document" section: you can list a whole bunch of locations there. Just keep clicking the "**Add Area Index**" button and adding another one until your locations are complete. You **must** click this button for your entry to move into the box below where the list will show up. Your letter will have only one upload but will come up under each location you have entered. Multiple copies of the same letter take up lots of extra storage space and are confusing. I am trying to eliminate them as I see them but it's a lot of work. Once one letter is in, when you start the entry with the TRACS number, you should get a dropdown with previous entries, so you can select the right one and just change the party and the date.
- M. **It is now easier to upload multiple letters in a batch** using the "Copy Data" button: Once you have uploaded one letter of a set, click the Copy Data button. The entry will briefly flash off and then return. You can now change the Letter Name (sometimes just the agency and letter signature date), the Letter Date for the new letter, and then browse to the desired letter, followed by Upload. The same Area Index is preserved, and the letters are linked to each other. This saves a few steps in the upload process.
- N. **Make your entries complete, with route and milepost:** don't skip this, even for letters! It only takes another few seconds, and will make the letter/report easier to find by the next searcher.
- O. If the letter relates to a local government project or something else that isn't on a major highway/freeway, use a route/milepost close to the project, perhaps within a mile or two. That

way someone searching the area will come across it. Sometimes it's just not close to anything; then put "Unknown" and "0" in the route and milepost boxes, and try to work the location into the letter title. Examples: "**SR192 Sec106 NAE 5thSt.UPRR SHPO 8-10-12**" or "**SS915.SS916 106 GilbertRd NAE SHPO 3-12-12**".

- P. Maintenance Districts names have been updated to the new format (not really so new anymore), so please start adding those to your uploads. If you're not sure, check in the Portal map to find what you need. The old, existing listings were converted by location, so they should be correct.
 - Q. Clear fields in between search entries. Sometimes you have to "clear" multiple times. I'm trying to get that fixed.**
 - R. If it goes to sleep, as in functions-seem-not-to-work, click on the Team Resources tab (or anywhere out of the Upload or Search function) and then back to Upload (or Search). It should come to life (!)
 - S. **Please don't shortcut your entries:** for the Portal to have value, it must be searchable, and the data you enter will make it easier for someone after you to find what they need quickly and easily. Hopefully, careful entry has helped you find something you needed at some point. Continuous Portal improvement helps everyone who is using it for research!
 - T. **If you have an author who is not listed in the pulldown menu, email the name to me.** The add-a-new-author feature on the Portal is not working. It's on the fix-it list.
7. **Remember to close the portal, and to log off of the virtual network (Citrix) when you finish.**
 8. **You should logon to the portal at least once each 30 days for your account to remain active.** After 75 days I get notices from security telling me who hasn't logged in and is in danger of being terminated, which I have to pass on to consultants. It is very helpful to avoid this process, so if you could please put a reminder in your calendar (or whatever works for you) to log in every now and then (whether you need it or not!), we would very much appreciate it.
 9. Remember, the Portal is a work in progress: if you see things that need correcting, let me know. If you have reports that aren't there but should be, send them to me and I'll upload them (or you can upload them yourselves). If you have suggestions on improvements, let me know; I already have a long list for the programmers when I next get a shot at changes. Any other ideas: let me know!
 10. If you need to reset a password or PIN, or are having technical problems, call the ADOT Service Desk at 602-712-7249.
 11. If you have other questions, problems or comments, please call or email Shearon Vaughn at 602-712-6428 or svaughn@azdot.gov. I may end up referring you to the Service Desk anyway, but I can try!