

Falcon Web Users Guide – Professional Services Procurement

Falcon will be utilized for the submission of Expressions of Interest (EOI) and other related documents required when responding to a Request for Proposal (RFP) for professional services. Falcon is the department's CADD File Management System; a document management program used to store and manage electronic files. Access to the Falcon system and Web site can be obtained as outlined below.

The employee of the firm who will be interfacing with the Falcon Web Site will need an individual login and password. Some firms may already have a person with an existing Falcon login that they use to submit plans, and will also use the same person to submit EOIs. Any existing accounts will only require an email to the CADD Support Helpdesk to request additional access to the professional services procurement area of Falcon. The firm will receive an email reply when access is granted.

If your firm does not have an active account, you can request a new account by downloading the forms using the hyperlink below. Once you have downloaded the Falcon Access & Security Agreement form and the LD-894 form, please complete the forms and send them via fax or e-mail as indicated on the form.

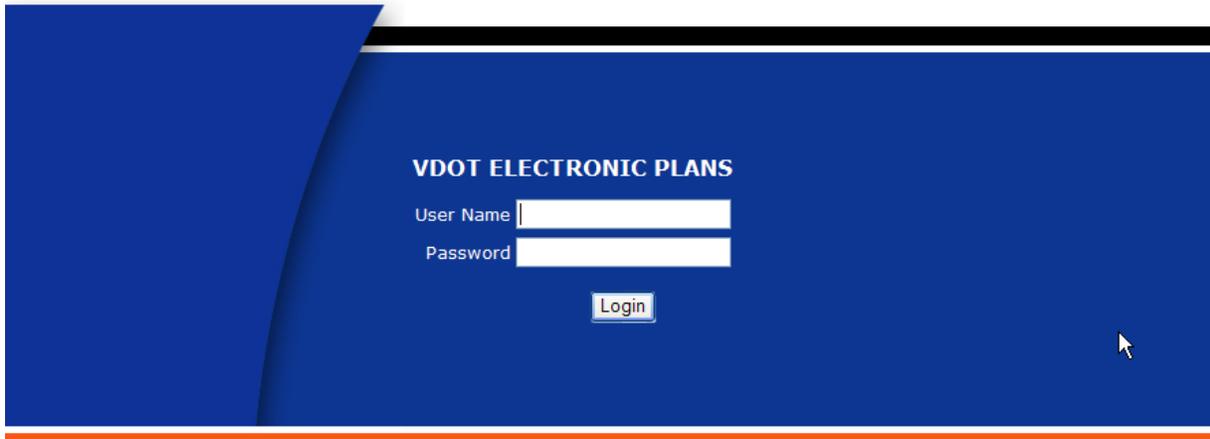
Link to instructions on how to request a login/password and access to projects in Falcon:
http://www.virginiadot.org/business/resources/LocDes/How_To_Obtain_Falcon_Access.pdf

If you have any questions please contact the CADD Support Helpdesk by email CADDSupport@vdot.virginia.gov or call toll free (888) 683-0345 or local (804) 786-1280.

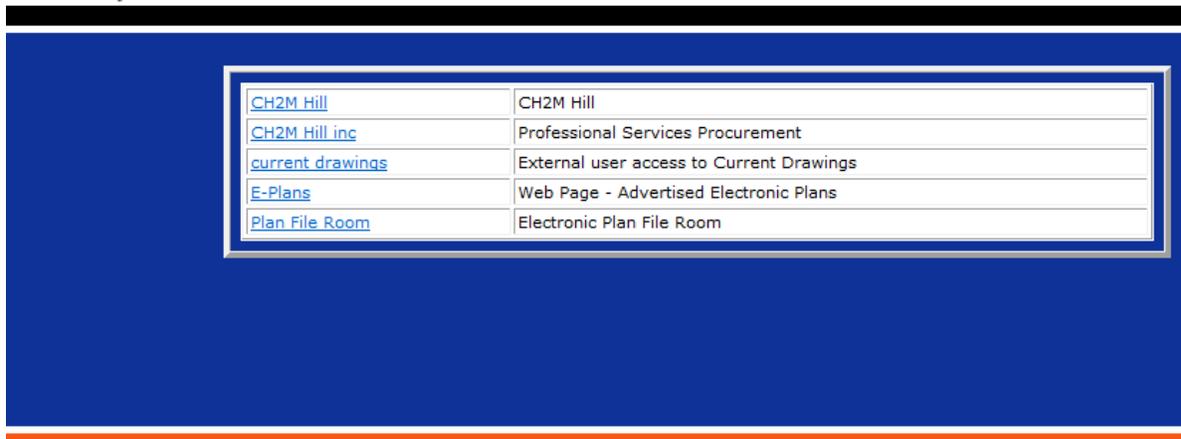
Once your login and password has been received, log into the Falcon Web site using this web address: <http://falcon.virginiadot.org/falcon/>. This will bring up the VDOT Electronic Plans login window, key in your **User Name** and **Password**.

Note: firms do not have to use the electronic plans features in order to access the professional services area.

Note: a firm's professional services submissions are not accessible except by the assigned login and password. There are no sharing features for professional services submissions. Firm documents are security protected, and are accessible only to the firm and to VDOT authorized site administrators.



Once you have logged in, you will see your consultant firm name and other areas of Falcon that you have access to. Click on the firm name with the description of “**Professional Services Procurement**” beside it.



This will bring you to the “**Search Screen**”. Click on the folder icon just to the right of the “**Company**” box first to select the firm name that you would like to access. You will only see your firm name in the list. Then select the folder icon just to the right of the “**Folder**” box to choose the folder you would like to search in.

Professional Services Procurements

Back Post Files Help Logout

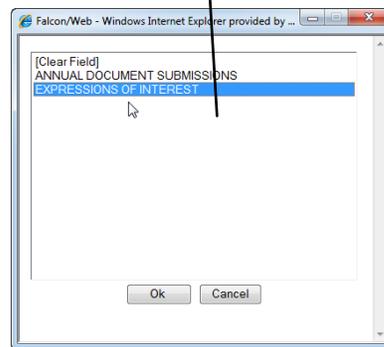
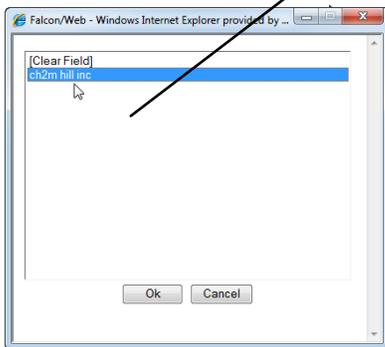
Company: ch2m hill inc

Folder: EXPRESSIONS OF INTEREST

Filename:

Submit Search

Required Fields - Click icons next to field for pick lists



Select the **Submit Search** button.
Once the Search is completed, the **Search Results** screen will appear.

Click to view document. Click to view document's properties. [Set View Preferences for Tif Files](#)

Back Select All Deselect Copy Out Checkout @ User Logout

Search Results: 2 matches

Options	Filename	Description	Company	RFP Number	Posted Date
	_vdoti95_final_combined.pdf	I-95 / 630 Interchange	ch2m hill inc		9/20/2013
	combinedvdot-i95file (2).pdf	I-95 / 630 Stafford County	ch2m hill inc		9/23/2013

From here several commands are available. The two most common are the **“View Document”** and **“View Document Properties”**. They can be found on the far left under the options column.



The Icons across the top of the Internet Explorer window can be used to do various operations.



Back – Used to navigate to the previous window

Select All – Puts a check beside all items in window

Deselect – Removes the checks on all selected items

Copy Out – Copies the selected files down from the server to the user’s PC for view only

Checkout – Copies the selected files down from the server to the user’s PC for modify purposes. This command is used to check out files that need to be updated and then checked back in.

@User – Queries to see which files are checked out to the user so they can be checked back in.

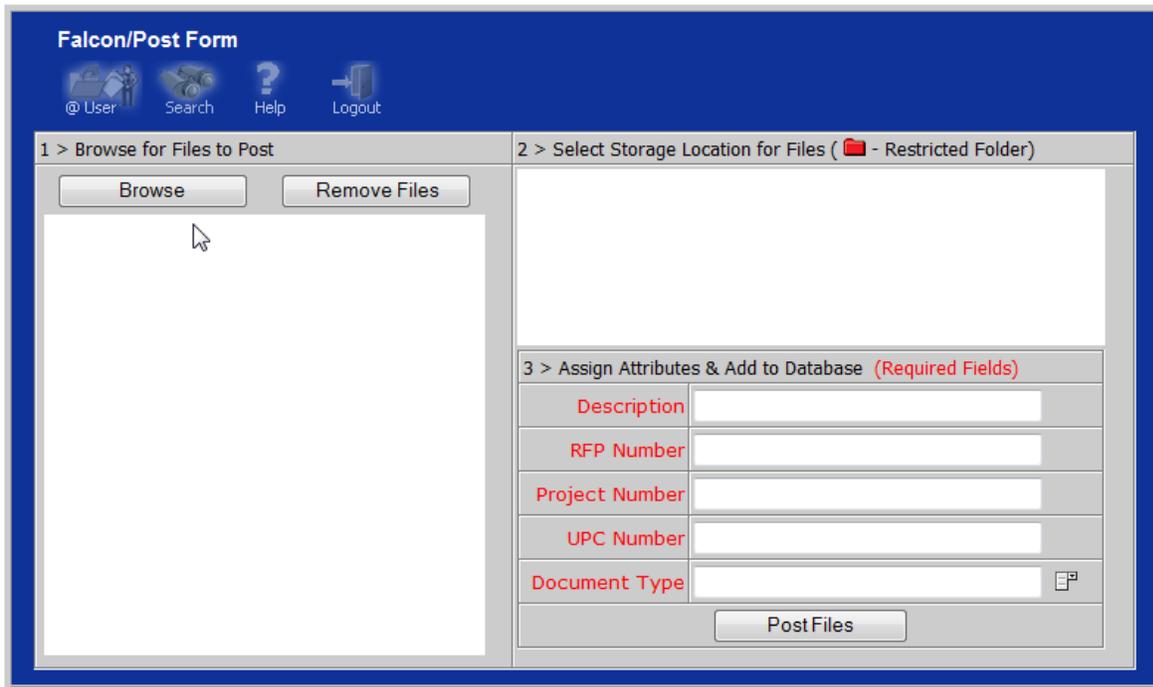
Logout – Logout

Posting Files (Add a New File) –

This command is used to add new files from the local PC to the VDOT Server. While at the “Search Screen”, select the icon for “Post Files”.

A screenshot of a web application interface titled "Professional Services Procurements". At the top, there is a blue toolbar with four icons: a left arrow labeled "Back", a right arrow labeled "Post Files", a question mark labeled "Help", and a right arrow labeled "Logout". Below the toolbar is a search form with three input fields: "Company", "Folder", and "Filename". Each field has a small folder icon to its right. Below the fields is a "Submit Search" button. At the bottom of the form, there is a red text note: "Required Fields - Click icons next to field for pick lists".

This will take you to a window that will allow the user to **#1 Browse for Files to Post** from local hard drive, **#2 Select Storage Location for Files** on the Server, **#3 Assign Attributes & Add to the Database** (Metadata). One or multiple files can be added at once.



Required Fields are in **Red**. (File will not be added to the server unless these are filled in.)

Select **“Post Files”** to add the file to the VDOT Server.

Updating Database Information (Metadata) –

Once a file has been uploaded, the user can edit the required database fields by selecting the **“View Document Properties”** icon beside the file.



Once this is selected, the **Document Properties** window will appear. This will allow you to edit the database information / metadata for each file.

Document Properties

 Back
  Save
  Help
  Logout

Company:	ch2m hill inc
Folder:	expressions of interest
Filename:	_vdoti95_final_combined.pdf
Description	I-95 / 630 Interchange
RFP Number	4272412
Project Number	0095-089-F09, 13558
UPC Number	12345
Document Type	EOI 
Availability:	On Server
Last Modify Date:	9/20/2013
Created On:	9/20/2013
File Format:	pdf

Click on the “Save” button at the top to save the metadata to the database.

File Naming Convention –

The Expression of Interest must include a three digit (alphanumeric) company name followed by the RFP #. Example – CH2_SB_20130923.pdf

If you have any questions please contact the CADD Support Helpdesk by email CADDsupport@vdot.virginia.gov or call toll free (888) 683-0345 or local (804) 786-1280.