

MassDOT Project Information Portal User Guide

V 1.1

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Version History

<u>09/2025 V1.1:</u>

This update has changes from 02/06/2025 up to August 22, 2025, release 1.1 with the following Major Highlights:

Designers Editing Live Schedule:

- Design Lead Contact(s) can request the Project Managers to provide edit access for the Live Schedule to the Design Lead Contacts
- Project Managers will be able to grant Edit Access for the Live Schedule to the Design Lead Contacts
- Design Lead Contacts are able to work directly on Live Schedule after getting the access
- Project Managers are able to revoke the Edit Access for the Design Lead Contact(s) once the updates are done

Document Management:

- Document Tags for Combo Submissions
- Common Selection of Document tags for Efficient Tagging while uploading documents
- Other Document name Column & Filter

Version	Date Modified	Notes	Modified By
V1.0	2/6/2025	Final Version	Abhikant Sharma
V1.1	09/2025	Up to Release 1.1	Abhikant Sharma

1. Purpose of this Guide

This User Guide provides guidance on how to request access, navigate and utilize the **MassDOT Project Information Portal**.

2. Introduction

MassDOT has launched a centralized portal that provides access to communities, including the design firms, federal agencies and state, and local agencies to communicate with the highway internal users. Currently, this portal is streamlined, specifically, for the design firms to communicate with the highway project management teams in real-time, in support of their respective business processes. However, the intent is to further streamline this portal to meet the specific needs of the other communities mentioned above.

Role(s)	Responsibilities/Activities
External Design Lead Contact	 Reviewing My Work & Notifications My Work Items via My Work screen Accessing Projects Searching Schedule Selecting Design Schedule Template Creating a copy of the Live Schedule on the Edit Schedule Proposing Baseline Schedule under the Edit Schedule Updating Completed Activities Marking Activities/Activity Groups as Not Applicable Adjusting Dependencies & Durations Proposing updates on the Edit Schedule - Marking Activity Groups/ Sub-Activities as Not Applicable or Applicable again Adding Activity Groups Adding Activity Groups Adding Activity Groups Adding Activity Durations Editing Dependencies (Predecessor/Successor) Adding a Resubmission Reviewing Total Slack and Critical Path Editing Live Schedule - Requesting Access from the Project Manager for Live Schedule Editing Live Schedule after receiving Live Schedule edit access Logging Manual Update Submitting Edit Schedule Uploading Schedule History Uploading documents Searching/Downloading documents Exporting Schedule Search as a CSV Communicating via Chatter
Design Firm Admin (DFA)	 Managing External Design Lead Contact's Access Accept Deny Deactivate

3. Getting Started with MassDOT Project Information Portal

3.1. Requesting Access

Note: External Design Lead Contacts should refer to the <u>External Design Lead Contact(s)</u> Section.

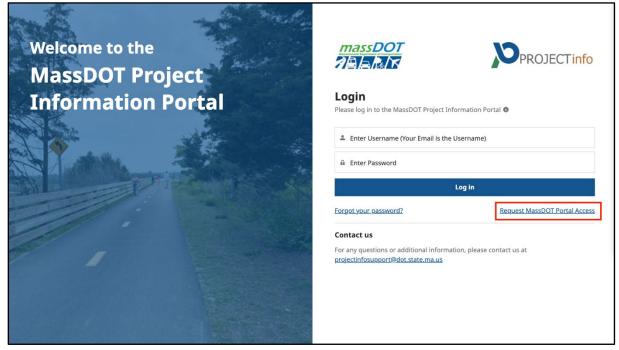
For all other users:

To request access to the **MassDOT Project Information Portal**, follow the steps outlined below.

For users other than External Design Lead Contact(s):

To request access to the MassDOT Project Information Portal, follow the steps below:

- 1. Go to the MassDOT Project Information Portal login page.
- 2. Click the Request MassDOT Portal Access link.



- 3. Manually enter the required fields. (Do not use autofill)
- 4. Click the **Mass.gov Privacy Policy** and **Web Accessibility Statement** links to review them and select the checkbox to acknowledge.
- 5. Click Submit.

Notes:

- To cancel the request, the users can click the **X** icon or **Cancel** button.
- In case of any questions or more information, users can contact the support team via projectinfosupport@dot.state.ma.us

3.2 Logging In

Prerequisite: User access to the Project Information Portal is approved, and a login password is set.

To access the MassDOT Project Information Portal, follow the instructions below:

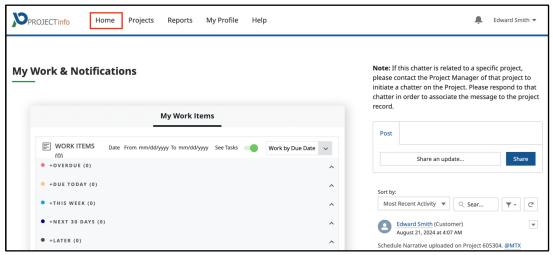
- 1. Go to the MassDOT Project Information Portal login page.
- 2. Enter Username and Password and click Log in.

Welcome to the MassDOT Project	PROJECTINFO
Information Portal	Login Please log in to the MassDOT Project Information Portal ()
	🔎 🚨 Enter Username (Your Email is the Username)
	Enter Password Log in
	Forgot your password? Request MassDOT Portal Access
	Contact us For any questions or additional information, please contact us at <u>projectinfosupport@dot.state.ma.us</u>

3. Upon login, a Non-Disclosure Agreement pop-up will appear. Click OK to proceed.

	initiate a chatter on the	P
	Non-Disclosure Agreement	ci
D	Some of the information contained on the MassDOT Project Information Portal may be considered confidential and/or proprietary to MassDot. Portal users agree that all information will be used for internal purposes only and solely in support of the applicable MassDOT project.	
	Information is not subject to disclosure unless MassDOT determines that such disclosure is required by the Massachusetts Public Records Law, M.G.L., c. 66, s. 10.	qı
	ок	

4. The user will be directed to the Home page



3.3 Forgotten Password

In case of a forgotten password, or the need to reset the password, follow the steps below:

- 1. Go to the MassDOT Project Information Portal login page
- 2. Click Forgot your Password?

Welcome to the MassDOT Project	
Information Portal	Login Please log in to the MassDOT Project Information Portal O
	Enter Username (Your Email is the Username)
	Enter Password Log in
	Eorgot your password? Request MassDOT Portal Access
	Contact us For any questions or additional information, please contact us at <u>projectinfosupport@dot.state.ma.us</u>

- 3. This redirects the user to the Forgot Your Password page.
- 4. Enter Username and click Continue.

Forgot Your Password	
To reset your password, enter your username. Username	
Cancel	

- 5. An email with a Password Reset link will be sent to the user.
- 6. Click the **Password Reset link**, which redirects to the **Change Your Password** page.
- 7. Enter a New Password, re-enter it in the Confirm New Password field, and click Change Password.

Change Your Password
Enter a new password for rahul.i.inavolu@dot.state.ma.us. Make sure to include at least:
 12 characters 1 letter 1 number 1 special character ()
* New Password
* Confirm New Password Match
Change Password
Password was last changed on 12/10/2024, 3:25 AM.

8. Users can log in to the MassDOT ProjectInfo Portal using the newly created password.

4. External Design Lead Contact(s)

For Release 1, the **External Design Lead Contact(s)** (from Design Firms or other Agencies) will be working in the Project Information Portal.

For External Design Lead Contact(s) there are two roles:

- Design Firm Admin (DFA)
- External Design Lead Contact (EDLC)

4.1. Design Firm Admin Role

Prerequisites: Design Firm needs to identify at least one user who will be the **Design Firm** Admin (DFA).

The **Design Firm Admin (DFA) Approves/Denies** the Access for the External Design lead Contacts for their firm to the **MassDOT Project Information** Portal.

Once the **Design Firm Admin (DFA)** is identified for a Design Firm:

- 1. The MassDOT System Admin is notified of the user who will be the Design Firm Admin (DFA) and will set them up:
 - a. **Design Firm Admin (DFA)** will receive an email to set up their account/password
 - b. They can login with username and password.
- 2. On first login, **Design Firm Admin (DFA)** will check the box for **Non-Disclosure Agreement (NDA)**
- 3. Design Firm Admin (DFA) will see an extra tab than other users named 'Manage Users'
 - a. All future requests from the Design Firm will come here for the DFA to Approve or Deny. Refer to <u>Design Firm Admin Reviewing the Request</u> for more details.
 - b. DFA can also Deactivate users from this location. Refer to <u>Design Firm Admin</u> <u>Deactivating the User</u> for more details.

Note: A Design Firm Admin can perform all roles that an External Design Lead Contact can.

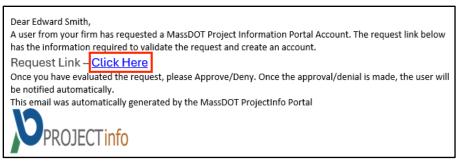
4.1.1 Design Firm Admin Reviewing the Request

The **Design Firm Admin (DFA)** will receive an **email notification** containing a link to review the **access requests** for users in their **Design Firm**. This is to ensure that only authorized personnel from the Design Firm can access **Project Information** and manage tasks on the MassDOT Project Information portal.

To review the request, follow the steps below:

1. Locate the notification email in the inbox and click the link to review the request

details.



- 2. Users will be redirected to the MassDOT ProjectInfo Portal Login page. For more details on logging in, follow the steps outlined in the <u>Logging In</u> section.
- 3. Once logged in, Review the Contact details e.g., Name, Email, Reason for Access etc.
- 4. Click the Approve/Deny/Deactivate Portal User button.

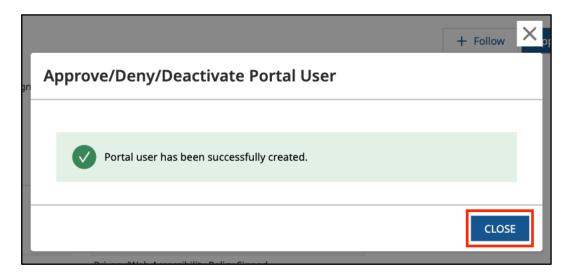
PROJECTINFO Hon	ne Projects	Reports My Profile	Help Manage	Users	🖉 Edward Smith 👻
Manage Users					
Contact Murphy Cooper				+ Follow	Approve/Deny/Deactivate Portal User Edit
Title Account Name WSP USA INC	Is Design Firm Adm	in? Phone Number (406) 444-7773	Username/Em rahul.i.inavo	ail lu@dot.state.ma.us	
DETAILS RELATED					
Name		Reason for Access			
Murphy Cooper		Test		1	
Account Name WSP USA INC	1	Privacy/Web Accessibility Pol	licy Signed	1	
Is Design Firm Admin?		Account Type Design Consultant		1	
Access Status Pending	/	Language		1	
Title		Time Zone		<i>I</i>	
Username/Email rahul.i.inavolu@dot.state.ma.us	k*			×	

5. An Approve/Deny/Deactivate Portal User pop-up displays.

 If the details are valid, select "Approved" from the dropdown list and click the Submit button. Else, if the details are invalid, select "Decline" and click Submit.

	×
Approve/Deny/Deactivate Portal User	p
u Users will be notified of the Approval / Denial.	
Please provide your decision on this request * Access Status	
Approved	÷
	Submit

- 7. This action will trigger an **email notification** to the **External Design Lead Contact** informing them of the decision.
- 8. If **Approved**, the message '**Portal user has been successfully created**" displays, and two emails will be sent to the specified email address: a **Welcome Email** and a separate email containing **Portal Access Instructions**.



- 9. Click the **Close** button.
- 10. The **Design Firm Admin (DFA)** can see the Status updated under the **Access Status** column.

PROJECTinfo	Home	Projects	Reports	My F	Profile	Help	Manage L	sers			ę	Edward Smith 👻
Manage Users												
											View Deactiv	ated Users Disabled
Name	~	Design Firr	n Account	\sim	Title		\sim	Email	Phone	~	Access Status	~
1 Murphy Cooper		WSP USA IN	IC					rahul.i.inavolu	4064447773		Approved	
					PREVIO	US p	age 1 / 1	NEXT				

4.1.2 Design Firm Admin Deactivating the User

The **Design Firm Admin** has the authority to **deactivate External Design Lead Contact(s)** when they are no longer employed by their firm or associated with **MassDOT**.

Prerequisite: To **deactivate** a user, the **Access Status** must be set to **Approved**. Follow the steps below:

- 1. Log on to the MassDOT Project Information Portal
- 2. Go to the Manage Users tab
- 3. Click on the Name of the user to be deactivated

PROJECTinfo	Home	Projects	Reports	My Pi	rofile He	lp	Manage U	sers			🔮 Edwa	ard Smith 🔻
Manage Users												
											View Deactivated	Users Disabled
Name	~	Design Firn	n Account	\sim	Title		~	Email	Phone	\sim	Access Status	~
1 Murphy Cooper		WSP USA IN	C					rahul.i.inavolu	4064447773		Approved	
					PREVIOUS	pa	age 1 / 1	NEXT				

- 4. Review the Contact details e.g., Name, Email, Reason for Access etc.
- 5. Click Approve/Deny/Deactivate Portal User.

OPROJECTinfo Hor	ne Projects	Reports My Profile He	lp Manage Users		Ledward Smith
lanage Users					
Contact Murphy Cooper				+ Follow	Approve/Deny/Deactivate Portal User Edit
Title Account Name WSP USA INC	Is Design Firm Adm	nin? Phone Number (406) 444-7773	Username/Email rahul.i.inavolu@dot.state.ma.	us	
DETAILS RELATED					
Name		Reason for Access			
	1	Reason for Access Test	1		
Murphy Cooper Account Name	1				
Murphy Cooper Account Name <u>WSP USA INC</u> Is Design Firm Admin?		Test Privacy/Web Accessibility Policy Sigr	ned		
Murphy Cooper Account Name <u>WSP USA INC</u> Is Design Firm Admin? Access Status	1	Test Privacy/Web Accessibility Policy Sigr 🖌 Account Type	red /		
Murphy Cooper Account Name <u>WSP USA INC</u> Is Design Firm Admin? Access Status Pending		Test Privacy/Web Accessibility Policy Sign C Account Type Design Consultant Language	ned 🖉		
Murphy Cooper Account Name <u>WSP USA INC</u> Is Design Firm Admin? Access Status Pending	1	Test Privacy/Web Accessibility Policy Sigr 🖌 Account Type Design Consultant	red /		
Name Murphy Cooper Account Name WSP USA INC Is Design Firm Admin? Access Status Pending Title Username/Email	1	Test Privacy/Web Accessibility Policy Sign C Account Type Design Consultant Language	red //		

- 6. Select **Deactivate** from the **Access Status** dropdown.
- 7. Click Submit.

Approve/Deny/Deactivate Portal User	
Please provide your decision on this request *Access Status Deactivate	Å
	Submit

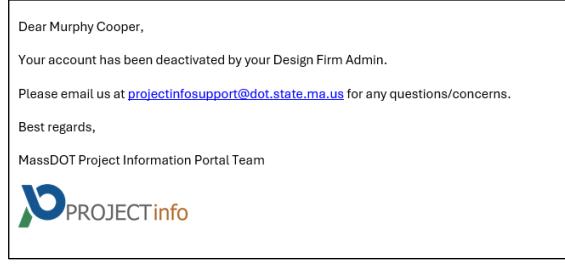
- 8. A message 'Portal User has been deactivated' displays.
- 9. Click the **Close** button.

+ Follow × PP
CLOSE

10. To view the list of deactivated users, enable the View Deactivated Users toggle.

PROJECTinfo	Home	Projects	Reports	My Profi	e Help	Manage Us	ers			🗜 Edw	ard Smith 👻
Manage Users 										View Deactivated	Users
Name	`	Design Fir	m Account	∽ Tit	le	~	Email	Phone	~	Access Status	~
1 Murphy Cooper		WSP USA I	NC				rahul.i.inavolu	4064447773		Deactivated	

Note: This sends an email notification to the External Design Lead Contact informing them of deactivation on their mentioned email address:



4.2. External Design Lead Contact Role

The **External Design Lead Contact** is responsible for managing the Project Schedule and preparing/uploading Design Package Submissions.

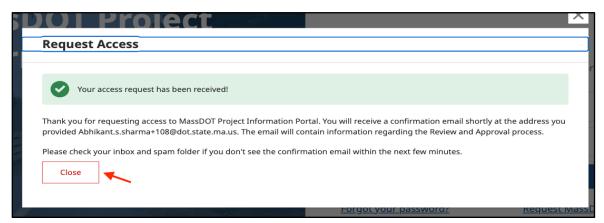
The **External Design Lead Contact** will navigate to the Portal Login Page via the Highway Website.

For the first time logging in, the External Design Lead Contact must request Access and follow the steps below:

- 1. Click on the **Request MassDOT Portal Access** link
- 2. Manually Enter the required fields. (Do not use autofill)
- 3. Click on Account Type dropdown and select 'Design Consultant'
- 4. A **Design Firm** field displays. Type in the name of your Design Firm, your Design Firm will appear in the dropdown. **Note:** It is important to select the name of the **Design Firm** from the list and not manually type it.

Request Access Enter information below to gain access to the MassDOT Project Info	ormation Portal
* Indicates required field	
* First Name	*Last Name
Ahikant	Sharma
* Account Type	Title
Design Consultant	▼
* Design Firm	
Ready	d'
* Email	* Phone Number
Abhikant.s.sharma@dot.state.ma.us	(405) 665-4557
* Reason For Access	
Please provide me with access	
Review the Mass.gov Privacy Policy and Web Accessibility State	
Contact us	
	e contact us at projectinfosupport@dot.state.ma.us
Contact us For any questions or additional information, please	e contact us at <mark>projectinfosupport@dot.state.ma.us</mark>
	e contact us at projectinfosupport@dot.state.ma.us

- 5. In the **Email** field, enter an **Email** with a domain provided by the Design Firm.
- 6. Click the **Submit** button. **Note:** Mandatory fields with missing or incorrect entries will be highlighted in red. In such cases, re-enter the information manually (autofill should be avoided) and click **Submit** again.
- 7. A success message 'Your access request has been received' displays. Click Close.



 This generates an email and bell notification that is sent to the Design Firm Admin informing them that an External Design Lead Contact is requesting access. The External Design Lead Contact also receives an Email with information regarding Review and Approval Process.

Thank you for requesting access to the MassDOT Project Information Portal. Our team will review your request to ensure it meets our access criteria. This process may take up to several days, depending on the volume of requests.

Please note that the ProjectInfo Portal is built on a Salesforce Platform. You will receive an email from the MassDOT Salesforce System Administrator with further instructions once your request is approved.

In the meantime, if you have any questions or need assistance, please do not hesitate to reach out to our support team at projectinfosupport@dot.state.ma.us.

Best regards,

MassDOT Project Information Portal Team

9. Once the Design Firm Admin (DFA) approves or denies the request, the External Design Lead Contact (EDLC) will receive an email notifying them of the decision. In the case of approval, the email will include instructions on how to set up their account. Refer to External Design Lead Contact Account Setup for more details.

4.2.1 External Design Lead Contact Account Setup

Once the access request has been approved, the **External Design Lead Contact** must complete their account setup by creating a password. The user will receive an email from the **MassDOT Project Information Portal** confirming the approval of the access request. This email will contain a link to create the password.

Note: Due to your firm security policies, emails from Salesforce may be directed to the spam folder if not found in the inbox.

To set up the password, follow the steps below:

1. Locate the email in the inbox and click the Change Password link.

Dear Murphy Cooper, We are pleased to inform you that your request for access to the MassDOT ProjectInfo Portal has been approved. Welcome aboard, we look forward to working with you. Here are the details you need to get started: Access Details: To get started, please click on the link below to create your password. Once you click the link you will see another Salesforce page asking you to change your password. You can create one by typing it in the New Password text box and then typing it again into the Confirm New Password text box You will notice that the password requirements are listed on the screen. As you type in your password, the bullets will fill in as you meet each requirement. In addition to the criteria listed on the screen MassDOT encourages you to avoid the following: • use of repeating, ascending, or descending character sequences (e.g., 12345, or abcde). including any part of your username or your firm name reusing previous passwords Once you have confirmed your password, click the Change Password button Link: Change Password MassDOT ProjectInfo Portal Link: Click here This is the link to access the ProjectInfo Portal. Username: rahul.i.inavolu@dot.state.ma.us Your username is the email address you entered in the ProjectInfo Portal Request Access form. Once you have successfully logged into the ProjectInfo Portal, you will be on the My Work page, which is your home page in the portal. From the home page, click on the Help option to get information about using the portal. If you have any questions about setting up your portal account or using the ProjectInfo Portal, do not hesitate to contact us at: projectinfosupport@dot.state.ma.us. Once again, we look forward to working with you! Best Regards, MassDOT Project Information Portal Team PROJECTinfo

- 2. Users will be directed to the Create Your Password page.
- 3. Enter the New Password, then re-enter it in the Confirm New Password field.
- 4. Click the **Change Password** button.
- Once the password is successfully set, the user will be automatically logged into the MassDOT Project Information Portal.

(Change Your F	Password
Entoria	new password for	
	navolu@dot.state.ma.us.	Make sure to include
at least:		. Make sure to include
at least.		
Ø	12 characters	
Ø	1 letter	
Ø	1 number	
Ø	1 special character 🕦	
* New P	assword	
		Good
* Confir	m New Password	
		Match
	Change Passv	word
Password	d was last changed on 12/	10/2024, 3:25 AM.

4.3. Home Tab

The image below illustrates the layout available for the External Design Lead Contact and Design Firm Admin respectively.

Upon login, the user is on the **Home** tab. This has three sections, My Work & Notifications and Chatter.

External Design Lead Consultant View:

PROJECTINFO Home Projects Reports My Profile Help	🔔 Edward Smith 👻
My Work & Notifications	Note: If this chatter is related to a specific project, please contact the Project Manager of that project to initiate a chatter on the Project. Please respond to that chatter in order to associate the message to the project
My Work Items	Post
WORK ITEMS Date From mm/dd/yyyy To mm/dd/yyyy See Tasks Work by Due Date V	Share an update Share
• +OVERDUE (0)	
• +DUE TODAY (0)	Sort by:
• +THIS WEEK (0)	Most Recent Activity 💌 🔍 Sear 🕎 👻 C ^d
• +NEXT 30 DAYS (0)	Edward Smith (Customer) August 21, 2024 at 4:07 AM
• +LATER (0)	Schedule Narrative uploaded on Project 605304. @MTX

Design Firm Admin View (a Manage Users tab is also visible):

PROJECTinfo Home Projects Reports My Profile Help Manage Users	🙎 Edward Smith 👻
My Work & Notifications	Note: If this chatter is related to a specific project, please contact the Project Manager of that project to initiate a chatter on the Project. Please respond to that chatter in order to associate the message to the project record.
My Work Items	Post
WORK ITEMS Date From mm/dd/yyyy To mm/dd/yyyy See Tasks Work by Due Date	Share an update Share
• +OVERDUE (0)	Share an update Share
• +DUE TODAY (0)	Sort by:
• +THIS WEEK (0)	Most Recent Activity 💌 🔍 Sear 🕎 👻 C ^e
• +NEXT 30 DAYS (0)	Edward Smith (Customer)
• +LATER (0)	Schedule Narrative uploaded on Project 605304. @MTX

4.3.1 My Work Items

My Work Items section displays schedule activities assigned to the user that must be completed for projects with an Approved Baseline Schedule.

To view Work Items, click on the down arrow against each **Work Item**. **Note**: Initially, no items are displayed in the **My Work Items** section. The My Work Items section serves as a starting checkpoint for the Users.

WORK ITEMS Date From mm/dd/yyyy To mm/dd/yyyy See Tasks Work by Due Date	record.
(0) • +OVERDUE (0)	Post Share an update Share
• +DUE TODAY (0)	Sort by:
• +THIS WEEK (0)	Most Recent Activity 💌 🔍 Sear 🛛 🍸 🗸 C ⁴
• +NEXT 30 DAYS (0)	Edward Smith (Customer)
• +LATER (0)	Schedule Narrative uploaded on Project 605304. @MTX Project Manager (Employee)

Users can customize **My Work Items** view by selecting the required type from the **Work by** drop-down list.

Refer to the brief description below to apply filters based on specific requirements:

- Work by Due Date: Filtering Items based on period (as shown in this screenshot). Recommended Filter
- Work by Project: Filtering items associated with Projects that are assigned to a user
- **My Priority Work:** Filtering according to level of importance (Critical/High, Medium/Normal, Low, None)
- Work by Type: Filtering by Item Type (Milestone, Activity, Card, Task)

My Work Items	
WORK ITEMS Date From mm/dd/yyyy To mm/dd/yyyy See Tasks (0)	Work by Due Date
• -OVERDUE (0)	Work by Due Date
+DUE TODAY (0)	Work by Project
• +THIS WEEK (0)	My Priority Work
• +NEXT 30 DAYS (0)	Work by Type
• +LATER (0)	^

Users can use the **Date** feature to view work items in a specific date range.

	My Work I	tems	
WORK ITEMS	Date From mm/dd/yyyy To mm/dd/	yyyy See Tasks	Work by Due Date 🗸 🗸
From Date	To Date		~
mm/dd/yyyy	mm/dd/yyyy	Ē	^
A	Cancel	Delete Save	^
+NEXT 30 DAYS (0)		^
• +LATER (0)			^

Each work item includes a lightning icon that provides access to **Quick Actions**. Click the lightning icon to reveal the list of actions. For example, to open a specific Project, select the **Navigate to Project** option from the list.

Date From mm/dd/yyyy To mm/dd/yyyy See Tasks 🛛 Work b	y Due Date 🗸 🗸
	~
★ ⊙ ⊖	🗲 🚺 🗩 Aug 01 2024
★ ⊙ ⊖	 Modify Date Assign Reviewers
★ ⊙ ⊖	 Avigate To Activity Group Mark Not Applicable
	🗲 Mark Applicable
	🗲 Navigate To Project
	🗲 Add New Activity Group
	 Havigate to Activity Log Manual Update Add Bridge Details
	★ ⊘ ○

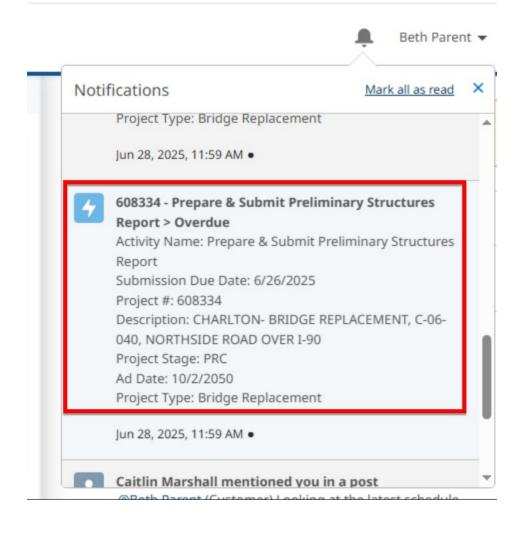
Users will be directed to the Project with which the activity is associated.

4.3.2 Notifications

The **Notifications** section provides a centralized list of all notifications received by the External Design Lead Contact. These notifications are triggered whenever there are updates related to a project, such as Design Submissions that are upcoming or overdue. On the Home page, scroll to the Notifications section to view the notifications.

• +DUE TODAY (0)	Comb la co
• +THIS WEEK (0)	Sort by:
+THIS WEEK (0)	Most Recent Activity 💌 🔍 Sear 🕎 🕶 C ⁴
• +NEXT 30 DAYS (0)	Edward Smith (Customer)
• +LATER (0)	Schedule Narrative uploaded on Project 605304. @MTX
	Project Manager (Employee)
	👍 Like 🗭 Comment 🖆 Share
	S Write a comment
	Edward Smith (Customer) August 5, 2024 at 2:47 PM
	@Aleksey N Belov (Employee) Draft RFQ docs have been uploaded
Notifications Printable View	💼 Like 🌘 Comment 🖆 Share
All Notifications V	
0 items • Sorted by Project # • Filtered by All notifications • Q Search this list 🕸 - 🗐 - C ⁴ 🔮 🔻	B Write a comment
Project # 1 V Description V Subject V Bell Notific V Recipients V Created Da V	
	Edward Smith (Customer)
	Refresh
	🖬 Like 🌘 Comment 📝 Share
Notifications	
4 items • Sorted by Created By • Filtered by All notifications • Q. Search this list 🔅 • 🗮 • C ^a C ^a V	Write a comment
Recipie v Creat † v Pr v D v Subject v Bell No v Recipie v Created v	
1 MTX PM, Q Project Ma 909900 909900 Bri Review Bri Project Ma 10/21/2024 💌	
2 MTX PM, Q Project Ma 909900 909900 Ba Review & A Project Ma 10/21/2024 💌	
3 MTX PM, Q Project Ma 909900 909900 Bri Review Bri Project Ma 10/21/2024 💌	
4 MTX PM, Q Project Ma 909900 909900 Bri Review Bri Project Ma 10/21/2024 💌	4

Users can also view the notification alerts from the Bell Notification button.



4.3.3 Chatter

External Design Lead Contact will receive **Chatter** from the Project Manager when assigned to a **Project**.

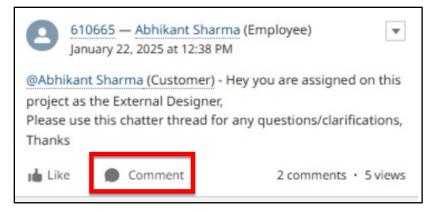
1. Go to the **Home** Tab and Locate Chatter section on the right side of the page.

PROJECT info Home Projects Reports My Profile Help Manage Users	👷 🛛 Abhikant Sharma 👻
My Work & Notifications	Note: If this chatter is related to a specific project, please contact the Project Manager of that project to initiate a chatter on the Project. Please respond to that chatter in order to associate the message to the project record.
My Work Items	Post
WORK ITEMS Date From mm/dd/yyyy To mm/dd/yyyy See Tasks Work by Due Date V	Share an update Share
• +OVERDUE (0)	
+DUE TODAY (0) +THIS WEEK (0)	Sort by: Most Recent Activity Q 5 Q ⁴

2. Scroll down and locate a **Chatter** posted by the Project Manager regarding Project assignment.

Share an update		Share
Sort by:		
Most Recent Activity	Q <u>5</u>	▼ - C'
610665 — Abhikant Sharma January 22, 2025 at 12:38 PM	(Employee	*)
January 22, 2025 at 12:38 PM		
January 22, 2025 at 12:38 PM Abhikant Sharma (Customer) - H		
January 22, 2025 at 12:38 PM @Abhikant Sharma (Customer) - He project as the External Designer, Please use this chatter thread for a	ey you are a	assigned on this
	ey you are a	assigned on this

3. Click on Comment.



4. Enter a message in the text box, tag the desired user using (@), and click **Comment.**

0		ireg f mitte		er] Sc	hedu	le Upo	dates	are	
	в	I	U	÷	\underline{T}_{x}	≔	1=		
		0	Θ	20					
	6						[Commer	nt

5. The tagged User will receive a Bell Notification.

Note: If there is no **Chatter** from the Project Manager mentioning about the assignment. Users can also initiate a **Chatter** by clicking on **Share an Update** and tag the Project Manager.

If it's a Project Specific conversation, post a Chatter tagging the Project Manager to initiate a Project Specific Chatter. And Reply as a Comment to that Chatter as described in the above steps.

Important Note:

Chatter entries are equivalent to MassDOT emails and text messages, intended for professional business use only, and are subject to discovery under the Freedom of Information Act (FOIA).

4.4. Projects Tab

The **Projects** tab in the MassDOT Project Information Portal provides a centralized view of all projects associated with the Design Firm. This tab is divided into two sections:

- All Projects (My Firm): Shows all Projects linked to the Design Firm, providing a quick overview of general project information, even when User is not directly assigned.
- **My Projects**: Displays projects User is directly assigned to, allowing full access to view project details and perform updates as needed.

The **Projects** tab also enables users to track project statuses, manage tasks, and collaborate effectively within the portal.

4.4.1 All Projects (My Firm)

Under All Projects (My Firm), users can view only basic project information, including the Project Number, Description, Associate Project Manager's Email Address, and Key Milestone Dates.

PROJECTI	fo Home	Projects	Reports	My Profile	Help	Manage L	lsers				ļ	Edward S	mith 👻
Projects													
	Projects (My Firm)	, please click d	on the Project Ma	anager's email a	nd provide	the required i	nformation					Export	as CSV
Project #	∨ Description	√ Projec	t Manager 🗸 🗸	Project Mana	ger Email	District \downarrow	~	Municipality	\sim	Ad Date	\sim	Office Estimat	ie 🗸
613773	DISTRICT 4- SIDEV REPAIRS & IMPROVEMENTS A VARIOUS LOCATION	MTX P	roject Manager	dotprojectinfo	omod+qa31	District 4				10/05/2024		\$695	5,000.00
				PREVIC	ius p	age 1 / 1	NEXT						

The Design Firm Admin Users can also view the External Design Lead Contact(s) that are assigned on the Projects under their Design Firm.

	Project # V	Description \lor	Project Mana 🗸	Project Ma	District	~	Municipality \lor	External Design Lead Contac \vee	Ad Date	~	Offic
1	609262	BOURNE- RAIL TRAIL CONSTRUCTION (PHASE 1)	Joseph Gyujong Y	joseph.yoo@c	District 5		BOURNE		06/28/2025		
2	610802	SOMERSET- STORMWATER IMPROVEMENTS ALONG ROUTE 6, ROUTE 138, AND ROUTE 103 FOR TAUNTON RIVER	Koby J Lemrise	koby.lemrise@	District 5		SOMERSET		10/02/2025		
3	609061	CHICOPEE- INTERSECTION IMPROVEMENTS AT MONTGOMERY STREET, GRANBY ROAD, AND MCKINSTRY AVENUE	Jonathan E Freem	jonathan.e.fre	District 2		CHICOPEE	Van Kacoyannakis	12/06/2025		1

4.4.2 External Design Lead Contact Requesting Access to a Project

External Design Lead Contact needs to request access to get direct access for a specific project listed under **All Projects (My Firm)**:

- 1. Go to the **Projects > All Project (My Firm)**.
- 2. Locate the Project and click on the **Project Manager Email** link.

My Pi	rojects All Proje	ects (My	Firm)										
0					ŕ	all and provide the required i							export as CS
	Project #	~	Description ~	Project Manager	~	Project Manager Email	District	\sim	Municipality	~	Ad Date	~	Office Es
1	610665		STONEHAM- INTERSECTION IMPROVEMENTS AT ROUTE 28 (MAIN STREET), NORTH BORDER ROAD AND	Ryan Schorr	I	ryan.w.schorr@dot.state.r	District 4		STONEHAM		01/15/2028		

3. Enter required information in the Email body and click **Send**.

Note: The email body will be auto populated based on the selected project. If it is not (e.g., due to an outdated version of Outlook or a non-compatible email client), manually enter the project details and send the email to the Project Manager for assignment. Alternatively, copy the Project Manager's email and send the details

directly if Outlook or pop-ups are blocked.

		$ \begin{array}{c ccccccccccccccccccccccccccccccccccc$
\triangleright	То	Schorr, Ryan W. (MTX)
Send	Cc	
	Subject	Projection #610665 - External User Request to be added to Project Team

4. When the Project Manager adds the External Design Lead Contact to the Project, a Chatter should be initiated on a Project, and the External Designer should respond to that chatter to associate the message with the Project.

4.4.3 My Projects

All Projects assigned to the User will be displayed under **My Projects**.

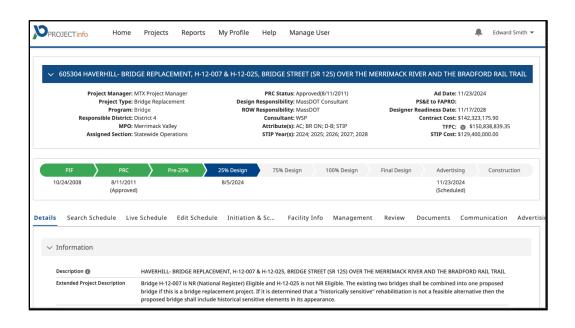
To go to **My Projects** page, follow the steps below:

- 1. On the Navigation Bar, click Projects.
- 2. Click the **My Projects** sub-tab to view the list of assigned projects.
- 3. Click on the required **Project #** hyperlink to go to the **Project**.

Note: The screen may need to be refreshed to display the project after assignment if it was already open.

эj	ects								
Pr	ojects All Proj	jects (My	/ Firm)						
									Export as C
	Project #	~	Description \lor	Project Manager \vee	District v	Municipality \lor	Ad Date	\vee Office Estimate \vee	Project Manag
1	605304		HAVERHILL- BRIDGE REPLACEMENT, H-12- 007 & H-12-025, BRIDGE STREET (SR 125) OVER THE MERRIMACK RIVER AND THE BRADFORD RAIL TRAIL	MTX Project Manager	District 4	HAVERHILL	11/23/2024	\$128,199,069.00	dotprojectinfom
2	000787			MTX Project Manager					dotprojectinfom
					PREVIOUS pag	e1/1 NEXT			

The user is directed to the selected Project.



4.5. Selecting a Design Schedule Template to create a Baseline Schedule (Initial Project Design Schedule)

Prerequisite: The Project Manager must have assigned the External Design Lead Contact for the project and sent a confirmation via **Chatter**.

After assignment, the External Design Lead Contact can select a Design Schedule template to incorporate into the existing Initiation-PRC schedule on the **Live Schedule**.

Note: In case, a Design Schedule Template has already been added to the project, follow the steps below:

- 1. Go to the Project.
- 2. Go to the Search Schedule.
- 3. Click on **Export as CSV** to export the Live Schedule Activities. This will document the date(s) of completed or in-progress activities prior to assignment. Refer to the <u>Export</u> <u>Project Activities as a Report</u> section for more details.
- 4. Contact the Project Manager using Chatter to request the deletion of the existing schedule template.
- 5. Once the deletion is complete, a new **Design Schedule Template** can be added.

To select and add a Design Schedule Template for a Project, follow the steps below:

- 1. Go to the **Project**.
- 2. Go to the Live Schedule.

✓ 610665 STONEHAM- INTERSECTION IMPROVEM	NTS AT ROUTE 28 (MAIN STREET), NORTH BORDER ROA	AD AND SOUTH STREET
Project Manager: Chris Seavey Project Type: Traffic Signals Program: Intersection Improvements Responsible District: District 4	PRC Status: Approved(1/29/2025) Design Responsibility: MassDOT Consultant ROW Responsibility: MassDOT Consultant: VANASSE HANGEN BRUSTLIN INC	Ad Date: PS&E to FAPRO: Designer Readiness Date: 9/25/2026 Contract Cost: \$1,485,001.00
MPO: Boston Region Assigned Section: Project Management	Attribute(s): ABP FA; D-B; STIP STIP Year(s): 2026	TFPC: \$1,595,001.10 STIP Cost: \$0.00
PIF PRC Prc-25%	25% Design 75% Design 100% Design	Final Design Advertising Construction
(Approved)	2/3/2023 2/0/2023	
etails Search Schedule Live Schedule Edit Sche	dule Initiation & Sco Facility Info Management	t Review Documents Communication Mor

3. By default, Users can see the Initiation-PRC Activity Group on the Live Schedule.

ID	+ Name		@ …	Start	End
	Plan Board(610665)			12/19/2019	01/12/2025
1	Initiation-PRC	:	0	12/19/2019	01/12/2025
1.1	 Project Initiation Form (PIF) Approved 	:	0	01/12/2025	01/12/2025
1.2	 Pre-PRC Evaluation Meeting(s) 	:	0	01/09/2025	01/09/2025
1.3	 Submit to Project Review Committee (PRC) 	:	0	01/09/2025	01/09/2025
1.4	PRC Meeting	:	0	01/09/2025	01/09/2025
1.5	 PRC Approval 	:	0	12/19/2019	12/19/2019
1.6	 Send PRC Approval Letter 	:	0	12/19/2019	12/19/2019
1.7	 Post-PRC Meeting - (Designer & PM Assign 	:	0	12/24/2019	12/24/2019

4. Click Select Schedule Template under the Schedule Status Info section.

Details	Search Schedule	Live Schedule	Edit Schedule	Initiation & Sco
✓ Sche	edule Status Info			
Schedule St	tatus			
Select So	hedule Template			

A Select Schedule Template pop-up displays.

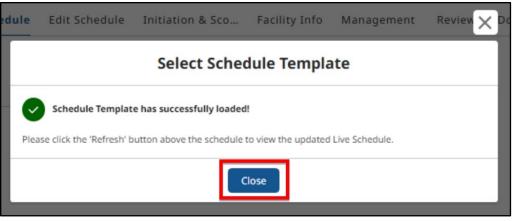
5. Click on the radio button next to the desired Schedule Template and click the **Next** button. **Note**: In this example the Design Bid Build Template is selected. The steps that follow are the same regardless of the Selected Template.

	×
Select Schedule	Template
Select Schedule Template	
Design Bid Build	
Design Build	
Resurfacing	
O Routine Maintenance	
Site Specific Streamlined Bridge Preservation	
Cancel	Save
Cancel	Save

6. A progress bar is displayed while the schedule template is loading.

hedule	Edit Schedule	Initiation & Sco	Facility Info	Management	Review	Docu
Г		Select Schee	dule Templa	ate		
Ι.	Please wa	it, the schedule template i Please do not close the b	~ /			
h Selected	Schedule template.	This may take a few min	utes. Please do no	t close the browser v	vindow at this	s time.

7. A success screen will appear once the progress bar completes. Wait for the schedule to finish loading. Click the **Close** button when the Gantt chart background changes from grey to white.



8. Once complete, the selected template will appear on the **Live Schedule**. The message, "You only have Read-Only Access to the Live Schedule." displays, indicating that proposed edits must be made in the **Edit Schedule**.

	Plan Board(610665)			12/19/	
1	Initiation-PRC	:	0	12/19/	
1.1	 Project Initiation Form (PIF) Approved 	:	0	01/12/	Project Initiation Form (PIF) Approved
1.2	 Pre-PRC Evaluation Meeting(s) 	:	0	01/09/	Pre-PRC Evaluation Meeting(s)
1.3	 Submit to Project Review Committee (PRC) 	1	0	01/09/	Submit to Project Review Committee (PRC)
1.4	PRC Meeting	:	0	01/09/	PRC Meeting
1.5	PRC Approval	:	0	12/19/	
1.6	 Send PRC Approval Letter 	I	0	12/19/	
1.7	 Post-PRC Meeting - (Designer & PM Assigned) 	1	0	12/24/	5
2	Design Bid Build (11/7/2024)	:	0	12/19/	
2.1	Contract/Project Management	:	0	12/19/	
2.1.1	Project Milestones	:	0	12/19/	

4.6. Adding Combo Submission

Depending on Project scope and/or need to expedite, Project design may be streamlined by combining Design submission packages, referred to as a **Combo Submission**.

Note: Combo Submissions are standard Activity Groups on many of the Design Schedule Templates like Resurfacing, Routine Maintenance & Site Specific Streamlined Bridge Preservation. If an additional Combo Submission is needed to be added, use the Add Combo Submission button.

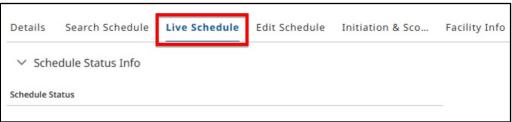
An **Add Combo Submission** is a combined submission of different project stages, such as 25% and 75% design. When a combo submission is completed, the application automatically updates the **Project Stage** to the higher of the two stages.

For example, if the **Percent Complete** for "Prepare and Submit 25%/75% Design Submission" is changed to 100% on the **Live Schedule**, the project stage will advance to the 75% design stage. This feature allows for the streamlined submission and progression of multiple design stages simultaneously.

Activity Submission	Project Progress
Prepare and Submit 25%/75% Design Submission	Project will move to 75% stage
Prepare and Submit 75%/100% Design Submission	Project will move to 100% Stage
Prepare and Submit 100%/PS&E Submission	Project will move to Final Stage

To add a Combo Submission,

- 1. Go to the Project
- 2. Click on Live Schedule Tab



3. Click Add Combo Submission

Details	Search Schedule	Live Schedule
∨ Sche	edule Status Info	
Schedule St	tatus	
Add Com	nbo Submission	

4. Once clicked, it displays the types of Combo Submission that can be added on the Live Schedule:

	Add Co	ombo Submi	ssion
* Select one:			
	5% Design Package		
	00% Design Packag		
O Add 100%/	PS&E Design Packag	je	
Cancel			Save
Cancel			

5. Select Add 25%/75% Design Package option and click on Save.

		×	(
ed	Add Con	nbo Submission	Do
	* Select one: Add 25%/75% Design Package Add 75%/100% Design Package Add 100%/PS&E Design Package		
	Cancel	Save	

6. Upon completion of the loading process, a green success message stating '**Combo Submission added successfully**' is displayed.



When a combo submission is completed, the application automatically adds the **Combo Submission Template** above the higher of the two stages. For example, if the **Combo Submission** for "25%/75% Design Submission" is added, it is automatically placed above the 75% Design package on the Live Schedule.

4.7. Edit Schedule for Baseline Creation

Note: The Live Schedule is Read Only for the External Design Lead Contact(s). And thus, for proposing the Baseline Schedule Updates, the External Design Lead Contact(s) need to utilize the **Edit Schedule**. The Project Manager can make updates directly on the **Live Schedule** when needed.

To create an original Baseline Schedule, the External Design Lead Contact must first make a copy of the **Live Schedule** and propose any necessary changes under the **Edit Schedule** tab. Prior to copying the **Live Schedule** for editing, any required additions of the combo submission should be made within the **Live Schedule**.

Note - The Live Schedule is Read Only for the External Design Lead Contact(s). And thus, for proposing the Baseline Schedule Updates, the External Design Lead Contact(s) need to utilize the **Edit Schedule**. The Project Manager can make updates directly on the **Live Schedule** when needed.

To create an original Baseline Schedule, the External Design Lead Contact must first make a copy of the **Live Schedule** and propose any necessary changes under the **Edit Schedule** tab. Prior to copying the **Live Schedule** for editing, any required additions of the combo submission should be made within the **Live Schedule**.

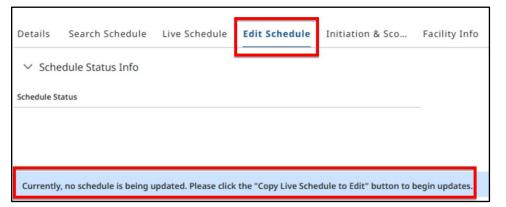
4.7.1 Copying a Live Schedule

Note: Add the Combo Submission on the Live Schedule first, if required. Refer to the <u>Add</u> <u>Combo Submission</u> section for detailed instructions.

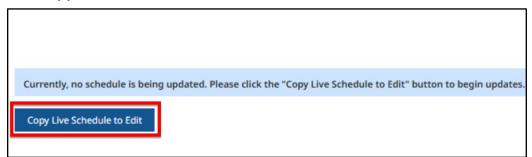
To make a copy of the Live Schedule, follow the steps below:

- 1. Go to the Project
- 2. Go to the Edit Schedule.

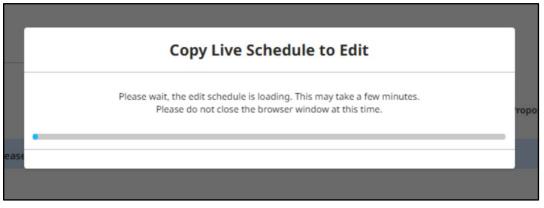
Note: If no schedule is currently being updated, an alert will be displayed on the page.



3. Click Copy Live Schedule to Edit.



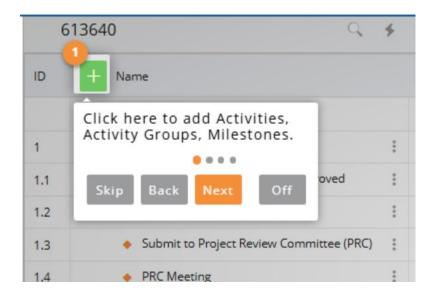
4. A progress bar is displayed while the Copy of the Live Schedule under the Edit Schedule is being generated.



5. A success screen is displayed once the progress bar is complete. Close this screen and wait for the schedule loading to be completed.

	×
Copy Live Schedule to Edit	
Edit Schedule has successfully loaded!	
Please click the 'Refresh' button above the schedule to view the updated Edit Schedule.	ro
Close	

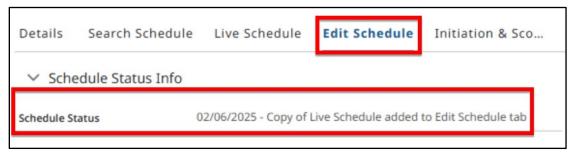
You would also see the following popup. Click Turn Off or Skip to close it.



6. Once this process is complete, the Copy of the Live Schedule appears under the **Edit Schedule** Tab.

10					1	20	020			20)21			2	2022			
ID	+ Name		@ …	Start	(Q	1 Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	
	🍃 610665 - Edit Schedule			12/19/2	-													=
1	Initiation-PRC	1	0	12/19/2	-								_					-
.1	 Project Initiation Form (PIF) Approved 	:	0	01/13/2														
.2	 Pre-PRC Evaluation Meeting(s) 	:	0	01/10/2														
.3	 Submit to Project Review Committee (PRC) 	÷	0	01/10/2														
.4	 PRC Meeting 	1	0	01/10/2														
1.5	 PRC Approval 	:	0	12/19/2														
1.6	 Send PRC Approval Letter 	:	0	12/19/2														-

7. Also, Under the **Schedule Status Info** section, the **Schedule Status** field is updated with today's date and the status, *'Copy of Live Schedule added to Edit Schedule tab'*.



4.7.2 Viewing and Customizing the Edit Schedule

The External Design Lead Contact can view the contents and customize the view of the **Edit Schedule**.

The frequently used customizable features are described below:

Refresh button:

The **Refresh** button updates the schedule to display the most recent changes. It is used after editing activities in the schedule template to ensure the latest modifications are visible.



Expanded View:

Select the four-arrow icon located in the top-right corner of the **Edit Schedule** to open it in a new tab with an expanded view.

🛚 Undo 🧹 🔶 Previous Timespan	\rightarrow	Next Tir	mespan E	3aseline 🗸	Show 🗸	<u>ين</u>	~	Select Period 🗸	K ⊻	N
		0	Start	End	Dur		-	7 2024 7 May 18 May 19	May 20 May 20	
d(203203)			05/24/2024	05/31/2024	6 days					Pla
on-PRC	:	8	05/24/2024	05/31/2024	6 days					
oject Initiation Form (PIF) Approved	:	0	05/27/2024	05/27/2024	0 days					
e-PRC Evaluation Meeting(s)	:	0	05/24/2024	05/24/2024	0 days				P	e-PR
brait to Droject Deview Compatitude (DDC)		•	05/04/0004	05/04/0004	O davia			Cube	oit to Droi	act D

Note: In Expanded View, the **Reload this page** icon is at the top-left corner. Hovering over the icon will also indicate this. Click it to refresh the screen.

÷ -	→ C 🛱 😁 madothwayuat.sandbox.my.site.com/leank	cor_G	anttVie	w?fid=a0Vcq
61	0665 - Edit Schedule	*	Undo	← Prev
ID	+ Name		0	Start
	🍃 610665 - Edit Schedule			12/18/2019
1	Initiation-PRC	1	0	12/18/2019
1.1	 Project Initiation Form (PIF) Approved 	:	0	01/12/2025
1.2	 Pre-PRC Evaluation Meeting(s) 	:	0	01/09/2025

Filter Activities/Milestones by Key Words:

Users can filter and search for desired Activities or Milestones using keywords.

- 1. Select the **Search** icon (\bigcirc).
- 2. Enter the keyword in the field **Filter By keyword**.
- 3. To close the filter and see the results, click the X icon.
- 4. To reset the filter, click on the Search icon and then click the Reset icon ($^{\mathbb{C}}$). To see updated results, click on the **X** icon.

60	15304 (1) 5304 (1) 5304	÷	Previous Tir	nespan	→ Next
ID	Filter by keyword			0	Start
	Save Filter Filter On	⊠3			
	By Activity/Folder/MileStone Resource or 🚿				08/11/2011
1	By Category		:	8	08/11/2011
1.1	By Sticker	<u> </u>	Reset	icon	J2/2024
1.2	By Priority		:	0	07/01/2024
1.3		<u> </u>		-	07/01/2024
	By % Complete	-		0	
1.4				8	07/01/2024
1.5			:	9	08/11/2011
1.6			:	0	08/18/2011
1.7		d)	:	8	08/25/201
2			:	0	03/22/2027
3	Design Bid Build (7/12/2024)		0	0	08/11/2011

Note:

- Users can click the **Save Filter** button to retain their filter preferences. This enables them to view the same filtered results on the Schedule each time they return to the Project.
- Users have the ability to utilize a range of predefined filter options available in the pop-up. For Example, Users can filter on Stickers for Activities by using the **By Sticker** option as shown below:

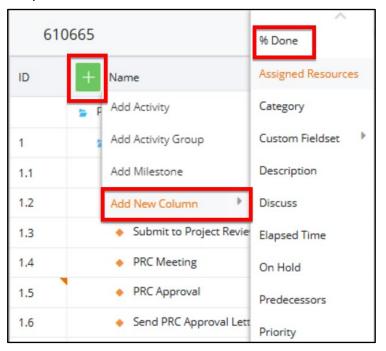
	Q \$	♦ Undo ←
Filter by keyw	ord	
Save Filter	Filter On	C x 11
By Activity/F	older/MileStone Res	ource or 🗸
	By Category	~
	By Sticker	<u>^</u>
Check All:		
100% 100	% Design	
25% 259	6 Design	
75% 759	6 Design	
R Arti	vitv Risk Added	-
	By Priority	~
	By Linked Card	~
	By % Complete	~

• Users can also reset the filters after use, by clicking on the **Reset** Icon

Save Filter	Filter On	C	>
By Activity/Fo	older/MileStone Resource	or	~
	By Category	6	~
	By Sticker		~
	By Priority		~
	By Linked Card		~
	By % Complete	a.	~

Adding Columns:

- 1. To add a column on the Schedule, click the + icon next to the **Name** column.
- 2. Select **Add New Column** > desired column (For example, **% Done**) from the predefined dropdown list.



Name	Assigned Resources		@	Start
Add Activity	Category			
Add Activity Group	Custom Fieldset	WBS		1
Add Milestone	Description	Slack		0
Add New Column	Discuss	1	0	04/0
 Submit to Project Revie 	Elapsed Time	:	0	04/0
	0-11-1-1			

3. The selected column will be displayed on the Schedule.

+ Name	<u>@</u>	Start	End	Duration	% Done
Plan Board(610665)		12/19/2019	10/19/2026	2497 days	0
Initiation-PRC	0	12/19/2019	01/12/2025	1852 days	0
 Project Initiation Form (PIF) Approved 	0	01/12/2025	01/12/2025	0 days	0
 Pre-PRC Evaluation Meeting(s) 	0	01/09/2025	01/09/2025	0 days	0

Removing Columns:

- 1. To remove a column, hover over the column header until a downward arrow appears, then click on it.
- 2. A **Remove Column** option appears. Clicking on this will remove the column.

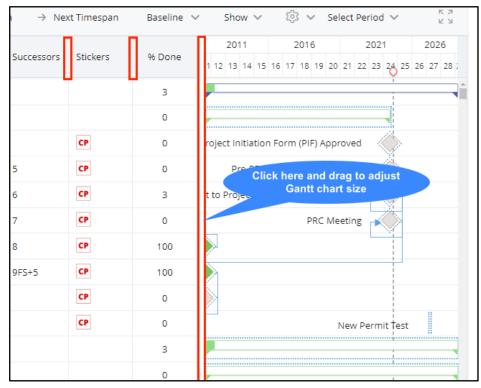
evious Timespa	an $ ightarrow$ Next	Timespan	Baseline ∨	Show 🗸 💈	א Select Period V א Select Period V
End	Predecess	Successors	Stickers	% Done 💌	2011 2016 2021 2026 11215141516171815202122252425262728
03/08/2029				3 R	temove Column
07/02/2024				0	
07/02/2024			СР	0	orm (PIF) Approved
07/01/2024		5	СР	0	aluation Meeting(s)

Adjusting column/Gantt chart size:

1. Click between the column headers and drag (Left/Right) to adjust the size.

	and drag to		umn headers solumn size	۹. ۶	- S Und	lo ←
Schedule	Schedule	ID	© Dierser	+ Name	Start	End
				🍃 Plan Board(605304)	08/11/20	03/08/20.
08/11/20	07/02/20	1	0	Initiation-PRC	08/11/20	07/02/20.
07/02/20	07/02/20	1.1	0	 Proiect I 	07/02/20	07/02/20.

2. Similarly, click on the Gantt chart separation line and drag (Left/Right) to adjust the Gantt column size.



Gear Icon:

1. Click the down arrow next to the Gear icon to display the dropdown menu.

			Zoom to fit
	End	Predecessors	
			Show Critical Path
1/2011	03/07/2029		Expand all
8/2011	07/02/2024		Collapse all
2/2024	07/02/2024		Today
1/2024	07/01/2024		Show Activities 100% Done
1/2024	07/01/2024	4	Hide Cards
1/2024	07/01/2024	5	Preferences
2/2011	09/02/2011	6	Activity History
8/2011	08/18/2011	7	Copy URL
5/2011	08/25/2011	055.5	· · · · · · · · · · · · · · · · · · ·

- 2. Users can utilize the following options in the dropdown menu to customize the Schedule view:
 - Collapse All will collapse all folders in the Schedule..
 - Expand All will expand all folders in the Schedule.
 - Enabling the **Show Activities 100% Done** toggle button will display only those Activities that are 100% complete.
- 4.7.3 Proposing Updates for Baseline Schedule

Note: To propose updates on the **Edit Schedule**, it is recommended to open the **Edit Schedule** in the **Expanded View**. Refer to <u>Viewing and Customizing the Edit Schedule</u> section for more details.

MassDOT has made the business decision that Activity relationships in the Design Templates are Finish-to-Start (FS) with no Lags. These constraints must not be modified in in your Baseline submissions. To align submission dates, EDLCs should adjust activity durations or add a new Activity to the Schedule in lieu of a lag.

Once a Copy of the Live Schedule is created under the Edit Schedule, the External Design Lead Contact can propose updates on the Edit Schedule for creating the Baseline Schedule. Users must refer to the most recent Microsoft Project Design Schedule (.mpp file).

Note: The following updates are automatically saved in the **Edit Schedule** if a user logs out or is timed out:

- 1. Activities Manually Scheduled
- 2. Changed End Dates and Durations
- 3. Activities marked as Not Applicable

- 4. New Activities/Activity Groups
- 5. Dependency Changes [If a User believes the dependencies of an activity are incorrect, they should email **Project Controls** to verify them.]

Important: Revised dates are not saved unless activity durations are updated or the Completed Activities are Manually Scheduled. Otherwise, dates will be driven by Schedule Logic.

While creating the **Baseline Schedule**, follow the steps below:

- Update the Completion Date(s) for the activities that were completed prior to the ProjectInfo Baseline Submission and mark those Activities as "Manually Scheduled". Include completed Activities where MassDOT is the Owner such as Reviews.
- 2. Update the Future Dates by revising the Duration(s) of the Activities.
- 3. Review and mark the Activities which are out of scope as Not Applicable (N/A).
- If a Combo Submission or a New Activity Group is added, or if Activities/Activity Groups are marked as Not Applicable, update the dependencies (Predecessors/Successors) as necessary to maintain the integrity of the Schedule Logic.
- 5. Users can filter activities using the **Major Milestone (M)** sticker to display all major milestones. After reviewing the end dates of these milestones adjust the durations of activities under the milestone as needed.

Note: Verify the **Designer Readiness Date** as needed and compare that to the Ad Date. Refer to the <u>Reviewing Ad Date on the Edit Schedule Gantt Chart</u> section for the steps to view Ad Date.

4.7.3.1. Updating Completed Activities

Prerequisite: The Copy of the Live Schedule under the Edit Schedule is created by the External Design Lead Contact.

For all Activities that were completed prior to the ProjectInfo Baseline Submission, the **Completion Date(s)** must be corrected on the **Edit Schedule**. Additionally, these activities must be marked as '**Manually Scheduled**'. The External Design Lead Contact may refer to the most recent **Microsoft Project Design Schedule (.mpp file)** for the project to obtain information on completed activities.

To update Completed Activities:

- 1. Go to the **Project**.
- 2. Go to Edit Schedule

Details	Search Schedule	Live Schedule	Edit Schedule	Initiation & Sco
✓ Sche	edule Status Info			
Schedule St	tatus	02/06/2025 - Copy of L	ive Schedule added	to Edit Schedule tab

3. Scroll down to the **Edit Schedule** and locate the Activity which is completed before the ProjectInfo Baseline Submission. **Note**: In this example the Activity **Conduct & Submit Survey** is used. The steps that follow are the same regardless of the Activity.

2.3	🍃 Design	:
2.3.1	Civil Survey	:
2.3.1.1	 Conduct & Submit Survey 	1
2.3.1.2	 Review & Approval Survey 	:

4. Click on the vertical ellipses (three vertical dots) and click on Edit Information.

+ Name		@	Start	20
🍃 Design	:	0	12/20/2019	
🍃 Civil Survey	:	0	04/19/2020	
Conduct & Submit Survey	1	0	04/19/2020	
 Review & Approval Survey 			~	
Bank Full Width (BFW) Survey	Edit	t Informa	ation	
 Conduct & Submit BFW Survey 	Disc	cuss		
 Review & Approval of BFW Survey 	Con	vert to /	Activity Group	
Wetland Resource Area Delineation	Con	nvert to I	Milestone	
 Conduct & Submit Wetlands Delineation 	Ado	i		Þ
🍃 Functional Design Report	Del	ete		

5. Under Activity Info Tab, locate the Start Date and Due Date fields.

Conduct & Submit Surve	ey		@ ×
E Activity Info	Category:		
Status	Default		*
S Log Time	Title:		
Risk	Conduct & Submit Survey		
L Subscribers	Description:		
Custom Fields			
Resource			
Activity Mode	Assign an Owner:	Priority:	
	Abhikant Sharma 🗸 🗸	None	~
Stickers	Start Date:	End Date:	
System - Do Not Use	Apr 20 2020	Jun 18 2020	Ē
	Duration:		

6. Click on the Calendar icon for the **Start Date** and adjust it accordingly to ensure that the **Due Date** reflects the correct **Completion Date** for the Activity. Use the downward arrow to modify the **Year**, the side arrows to navigate between **Months**, and select the appropriate date as needed.

<	April 2020 🗸 🚿			April 2020 🗸		
м	т	w	т	F	s	s
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	1	2	3
4	5	6	7	8	9	10)2
	Today					

7. After selecting the date, click on the **Activity Mode** Tab (or the **Milestone Mode** Tab if updating a Milestone) and locate the **Manually Scheduled** checkbox.

Conduct & Submit Survey					<i>ℓ</i> ×
Activity Info	Scheduling Mode:		Normal		~
Status	Actual Effort:		0 days		÷
S Log Time	Manually Scheduled:				
💼 Risk					
1 Subscribers					
Custom Fields					
② Resource					
E Activity Mode					
Stickers					
~					
				Delete	Save

8. Select the Manually Scheduled checkbox and click Save.

Conduct & Submit Surv	ey		@×
Activity Info	Scheduling Mode:	Normal	*
Status	Actual Effort:	0 days	\$
() Log Time	Manually Scheduled:		
Risk			
L Subscribers			
Custom Fields			
② Resource			
Activity Mode			
Stickers			
			Delete Save

Note:

- Once an activity is designated as **Manually Scheduled**, its dates will remain unaffected by any schedule updates to other activities.
- 4.7.3.2. Marking Activities/Activity Groups as Not Applicable

Any activity or activity group that is out of scope for the project must be marked as **Not Applicable (N/A).** By default, all activities and milestones are considered **Applicable** in the Schedule unless explicitly marked as **Not Applicable** by the user.

Impacts of Marking an Activity/Activity Group as Not Applicable:

- 1. Sets the Duration for the Activities to Zero (0)
- 2. Removes the Predecessors/Successors for the activity
- 3. Excludes the Activity from the **Critical Path Logic**
- 4. Removes the Scheduling Gantt Chart Lines from the Activity Groups
- 5. Adds a **Not Applicable(N/A)** sticker to the Activity/Activity Group
- 6. The Activity/Activity Groups' **Start** and **End** dates are changed to the **PRC Approval Date** automatically.
- 7. If the percent completion of the activity was incorrectly set with the status as 100% done, the system will change the status to 0.
- 8. Any pre-existing my Work Tasks are deleted for all the Activities marked Not Applicable.
- 9. No further My Work Task Assignment and Notifications/Emails are sent out for any Activity marked as Not Applicable.

Prerequisite: Since marking an Activity as **Not Applicable (N/A)** removes its **Predecessors/Successors** users must ensure the following within the Project Schedule:

- The previous **Predecessor** activities have a **Successor** activity (other than the activity that is to be marked as **Not Applicable**)
- The previous **Successor** activity has a **Predecessor** activity (other than the activity that is to be marked as **Not Applicable**)

For detailed steps on updating dependencies, refer to the <u>Editing Dependencies</u> section.

To mark an Activity Group/Activity as Not Applicable (N/A), follow the steps below:

- 1. Go to the **Project**
- 2. Go to Edit Schedule
- 3. Under the **Edit Schedule**, locate the Activity Group/Activity that needs to be marked as **Not Applicable**.

61066	5 - Edit Schedule 🧠 🗲 🐆 Undo 🔶 Previous Timespan	→ N
ID	Name	
2.3.11	25%/75% Design Package	
2.3.11.1	Prepare and Submit 25%/75% Design Package	:
2.3.11.2	 All Sections Review 25%/75% Design Comments sent to DE 	:
2.3.11.3	Prepare 25%/75% Design Responses	:
2.3.11.4	 Schedule and Hold Comment Resolution Meeting @25%/75% (Full Team) 	:
2.3.12	🍃 75% Design Package	:
2.3.12.1	Prepare & Submit 75% Design Submission	:
2.3.12.2	Review 75% Design Submission & Comments to DE	:
2.3.12.3	Prepare 75% Design Responses	:
2.3.12.4	 Schedule & Conduct Comment Resolution Meeting @75% (Full Team) 	:

4. Click on the vertical ellipses (three vertical dots), click on the downward arrow and click on **Quick Actions**.

Edit Schedule 🔍 🖇 🥱 Undo 🔶 Previous Timespan	Add	×.
Name	Delete	
	Indent	
25%/75% Design Package	Outdent	
Prepare and Submit 25%/75% Design Package	Clone	
 All Sections Review 25%/75% Design Comments sent to DE 	External Dependency	
 Prepare 25%/75% Design Responses 		
 Schedule and Hold Comment Resolution Meeting @25%/75% (Full Team) 	Quick Actions	
🍃 75% Design Package	: 3 02/12/2022 0	05/12/2022
 Prepare & Submit 75% Design Submission 	: 3 02/12/2022 0	04/12/2022
 Review 75% Design Submission & Comments to DE 	: (3) 03/14/2022 (04/12/2022

5. Click on Mark Not Applicable.

^	0 days	ign
Discuss	🗲 Modify Da	ite
Add	🕨 🗲 Navigate 1	Γο Activi
Delete	🗲 Mark Not	Applica
Indent	🗲 Mark App	licable
Outdent	🗲 Navigate 1	To Project
Clone	🗲 Add New	Activity
External Dependency	🗲 Navigate t	o Activity
Quick Actions	🕨 🗲 Log Manu	al Upda
~	🗲 Add Bridg	e Details

6. Once the process is complete, click **Finish** on the **Mark Activities Not Applicable** popup.

Mark Activities Not Applicable	
Activities marked Not Applicable.	
	Finish

When an Activity Group/Activity is marked as Not Applicable, A **Not Applicable(N/A)** Sticker is added to the Activities/Activity Group. User may need to click refresh for the N/A sticker to appear on their Schedule.

Note: Mark Not Applicable Quick Action can be used for an Activity, or an Activity Group or even a Parent Activity Group:



4.7.3.3. Adding Activity Groups

To add a **New Activity Group** on the Schedule, follow the steps below:

- 1. Identify the existing **Activity Group** under which the new group will be added.
- 2. Click the vertical ellipses (three vertical dots)

2.5.6.2	Noise Study Finalized and submitted with NEPA		0	05/23/2021	06/21/2021	30 days	ith NEPA
2.5.7	NEPA-Categorical Exclusion (CE)	1	0	03/24/2021	08/31/2022	526 days	on (CE)
2.5.7.1	Prepare & Submit Draft CE	Edit	Inform	ation		30 days)raft CE
2.5.7.2	Review Draft CE	Discuss				30 days	Draft CE
2.5.7.3	Prepare & Submit Final CE	Add			•	30 days	: Final CE
2.5.7.4	Review Final CE	Delete				15 days	Review Final CE
2.5.7.5	Environmental App of Programmatic CE					0 days	F Programmatic CE
2.5.7.6	 Submit Indv CE to FHWA 	Out				0 days	it Indv CE to FHWA
2.5.7.7	 FHWA Review & Approval of Individual CE 					30 days	oval of Individual CE
2.5.8	MEPA (ENF/EIR)	Clor	e			420 days	7EIR)
2.5.8.1	Prepare & Submit Draft MEPA ENF	Exte	rnal De	pendency		180 days	- ENF
2.5.8.2	Prepare & Submit Draft MEPA EIR	Quid	k Actio	ns	•	180 days	A EIR

3. Click on Quick Actions > Add New Activity Group

2.5.6.2	 Noise Study Finalized and submitted with NEPA 	:	0	05/23/2021	06/21/2021	30 days	ith NEPA
2.5.7	NEPA-Categorical Exclusion (CE)	:	0	03/24/2021	08/31/2022	526 days	on (CE)
2.5.7.1	Prepare & Submit Draft CE	Edi	t Inform	ation		30 days)raft CE
2.5.7.2	Review Draft CE	Dis	cuss			30 days	Draft CE
2.5.7.3	Prepare & Submit Final CE	Ade	Н		•	🗲 Modify Da	te E
2.5.7.4	Review Final CE	Del	ete			🗲 Navigate T	fo Activi iew Final CE
2.5.7.5	 Environmental App of Programmatic CE 		ent			🗲 Mark Not	Applica mmatic CE
2.5.7.6	 Submit Indv CE to FHWA 					🗲 Mark Appl	icable E to FHWA
2.5.7.7	FHWA Review & Approval of Individual CE		tdent			🗲 Navigate T	To Project ndividual CE
2.5.8	MEPA (ENF/EIR)	Clo	ne			🗲 Add New A	Activity
2.5.8.1	Prepare & Submit Draft MEPA ENF	Ext	ernal De	pendency		🗲 Navigate t	o Activity
2.5.8.2	 Prepare & Submit Draft MEPA EIR 	Qu	ick Actio	ns	Þ	🗲 Log Manua	al Upda

4. Enter a **New Activity Group** name and select **Activities** needed under the new Activity Group

✓ Add New Activity Group	
*New Activity Group	
New Activity Group	
 *Activities ✓ Prepare ✓ Submit ✓ Review △ Approval 	
Start Date	
	苗
* Activity Review Discipline	
Traffic & Safety	
Bridge	
Utilities & Constructability	

5.

Select the **Activity Review Discipline** based on the section for which the new **Activity Group** is being added. For example, if adding a **New Environmental Permit**, the appropriate **Activity Review Discipline** to select would be **Environmental**.

	苗
* Activity Review Discipline	
Design	
Traffic & Safety	
Bridge	
Utilities & Constructability	
- Environmental	
Right-of-Way	
* Stage Sticker	
None	;
WBS Code	
Event Code	

6. Select a **Stage Sticker** which is applicable for the **New Activity Group** and click **Next**.

 Utilities & Constructability Environmental Right-of-Way 			
* Stage Sticker Stage = 025%			:
WBS Code			
Event Code			
			Next

7.

Once loading is complete, the new **Activity Group** will appear in the **Edit Schedule**.

2.5.8	New Activity Group	:	0	08/22/2022	08/31/2022	10 days
2.5.8.1	 Prepare New Activity Group 	:	0	08/22/2022	08/31/2022	10 days
2.5.8.2	 Submit New Activity Group 	:	0	08/22/2022	08/31/2022	10 days
2.5.8.3	 Review New Activity Group 	:	0	08/22/2022	08/31/2022	10 days

- 8. Update the **Dependencies** (Predecessors and Successors) if it is not a linear dependency. Refer to the <u>Editing Dependencies</u> section.
- 9. To update more information, click the **Vertical Ellipsis** > **Edit Information** for the Activities under the New Activity Group.
- 10. In the pop-up screen for the selected Activity displays. Locate the **Activity Info** and update the **Assign an Owner**, **Start Date**, and **Due Da**te fields.

Pr		
Activity Info	Category:	
Status	Default	~
🕓 Log Time	Title:	
💼 Risk	Review Survey	
🚉 Subscribers	Description: HWY.303.030	
E Custom Fields		
② Resource	Assign an Owner:	Priority:
Activity Mode	Pankaj Dwivedi	✓ None ✓
Stickers	Start Date:	Due Date:
System - Do Not Use	Mar 26 2012	Jun 15 2012
	Duration:	
	60 days	≜ ▼
		Delete Save

Note: Assign the Project Manager as the **Owner** for new activities. The assigned Owner is responsible for actualizing the completed activity on the **Live Schedule**.

Prev	
Activity Info	Is Activity Group:
Status	Task Type:
203	
202 Risk	Area of Work:
202 L Subscribers	
202 Custom Fields	Schedule Change:
202 🔘 Resource	· · · · · · · · · · · · · · · · · · ·
202 🔳 Activity Mode	Review Section:
202 Stickers	WBS Code:
202 5 System - Do Not Use	CNT.MS.040
202	Event Code:
203	
203	Markup Folders Not Needed:
	Delete Save

11. Locate the **Custom Fields** update **WBS Code** and click **Save**.

Note: The WBS Structure is intentionally developed to align with the Area of Work and the Division/Subdivision of Work as defined in the Scoping Workbook. Do not modify the WBS Structure under any circumstances. For questions regarding WBS codes for new Activity Groups, contact Project Controls via Chatter.

Similarly, ensure the **WBS Code** for all the Activities/Milestones under the New Activity Group is updated.

4.7.3.4 Adding a new Activity after an existing Activity (Activity, Milestones)

Activities can be added above, below or within an existing Activity. Activity types are identified by the icons next to their names. The below image shows the various tasks on the Schedule.

To add an activity, navigate to the desired **Activity Group**, click the **vertical ellipsis** > **Add** > and select the required option from the dropdown.

Prepare & Submit Boring and Probe Layout	: O8/18/2020 09/16 el	Layout Plan
Review Boring and Probe Layout Plan	^	rout Plan
 Perform Probes and Borings/Soil Samples fo 	Discuss	s Analysis
Prepare and Submit Soil Sample Report for	Convert to Activity Group	lics Analysis
Prepare & Submit Geotechnical Report	Convert to Milestone	nical Report
Review & Approve Geotechnical Report	Add	Activity Above
Bridge Sketch Plan Submittal	Delate	Lucia Dia
Prepare & Submit Bridge Sketch Plans	Delete	Activity Below
Review Bridge Sketch Plans & Comments to	Indent	Milestone
	Outdent	

Options	Action on selection
Activity Above	An Activity is added above the selected Activity Group
Activity Below	An Activity is added below the selected Activity Group
Milestone	A Milestone is added under the selected Activity Group

- 12. The newly added **Activity** will be shown on the Schedule. Double-click the Activity to rename it.
- 13. **NOTE**: If an Activity is added by mistake, the External Design Lead Contact will not be able to Delete Activities from the Edit Schedule. Change its name to "Error" and the Project Manager should delete that Activity directly from the Live Schedule.

4.7.3.5 Editing Dependencies

Prerequisite: Columns for **Predecessor**s, **Successors** and **Sequence** are added on the **Edit Schedule.** Refer to <u>Viewing and Customizing the Edit Schedule</u> section to know more about adding a column.

To update the dependencies (Predecessors/Successors), follow the steps below:

1. Locate the **Sequence** value of the Activity that needs to be added as the **Predecessor/Successor** of the Activity and make a note of it.

ne	@	Start	End	Duration	% Done	Predecess	Success	S
 Revise and Resubmit Final RSA Report 	0	05/01/2020	05/07/2020	7 days	0	75	80;86	76
🍃 25% Design Package	0	01/23/2021	11/05/2021	287 days	0			77
Prepare & Submit 25% Design Submission	0	01/23/2021	03/23/2021	60 days	0	58	39;44;7	78
 Send to FHWA (if PODI) 	0	03/23/2021	03/23/2021	0 days	0	78		79
Review 25% Design Submission & Comments t	0	07/08/2021	10/05/2021	90 days	0	47;59;76;7	81	80
 Prepare 25% Design Responses 	0	10/06/2021	10/15/2021	10 days	0	39;80;199;	82	81
Schedule & Conduct Comment Resolution Me	0	10/16/2021	11/05/2021	21 days	0	81	91;98;1	82

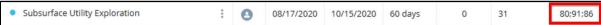
2. Go to the Activity where the **Predecessor/Successor** needs to be added

3. Double-click under the **Predecessor** or **Successor** column such that it becomes editable

me	@	Start	End	Duration	% Done	Predecess	Success
Revise and Resubmit Final R5A Report	0	05/01/2020	05/07/2020	7 days	0	75	80;86
🍃 25% Design Package	0	01/23/2021	11/05/2021	287 days	0		
Prepare & Submit 25% Design Submission	0	01/23/2021	03/23/2021	60 days	0	58	39;44;7
 Send to FHWA (if PODI) 	0	03/23/2021	03/23/2021	0 days	0	78	
 Review 25% Design Submission & Comments t 	0	07/08/2021	10/05/2021	90 days	0	47;59;76;7	81
Prepare 25% Design Responses	0	10/06/2021	10/15/2021	10 days	0	39;80;199;	82
Schedule & Conduct Comment Resolution Me	0	10/16/2021	11/05/2021	21 days	0	81	91;98;1

4. Enter the identified sequence value and click anywhere on the schedule to save the changes.

Note: If multiple **Predecessor** or **Successor** values are required, separate the sequence values with a semicolon (;) as shown below:



After updating the **Predecessor** and **Successor**, the dates automatically adjust based on the new predecessors and successors.

4.7.3.6 Reviewing Ad Date on the Edit Schedule Gantt Chart

The Ad Date is displayed on the Edit Schedule Gantt Chart as a Red Dotted Vertical Line.

• You can hover over the Ad Date Blue Box as well which would display the Ad Date for the Project as shown below -

	2024						2025						
Nov	Dec 2024	Jan 2025	Feb 2025	Mar 2025	Apr 2025	May 2025	Jun 2025	J¢ 2025	Aug 2025	Sep 2025	Oct 2025	Nov 2025	De
											Ad Date	3/2025 Ad D	ate
	Project Ir	itiation Fo	rm (PIF) Ap	proved	\diamond							,	
	Pre	e-PRC Evalu	uation Meet	ting(s) 🔇	¢								

4.7.3.7 Reviewing Major Milestones and adjusting Durations as needed

Prerequisite: Column for **Stickers** is added on the Edit Schedule. Refer to <u>Viewing and</u> <u>Customizing the Edit Schedule</u> section for more details on Adding a column.

All the Major Milestones on the Schedule have a sticker for **Major Milestone (M)** added to them. Users can review the Major Milestones on the **Edit Schedule** by filtering on the Major **Milestone (M)** sticker.

🍃 25% Design Package	0	03/20/2026	12/31/2026	287 days		68		
Prepare & Submit 25% Design Submission	0	03/20/2026	05/18/2026	60 days	49	69	30;35;70;71;153;184;186	Μ
Utility Coordination	0	10/12/2025	05/14/2027	580 days		74		
Schedule & Conduct Utility Early Coordinat	0	01/01/2027	01/14/2027	14 days	75;73	76	77;83;80	М

Refer to <u>Viewing and Customizing the Edit Schedule</u> section for more details on Filtering out the Activities **By Sticker** on the Edit Schedule.To update **Activity Durations** follow the steps below:

 Identify the Activity requiring a Duration update and double-click on its Duration column value. Consult the MassDOT Highway Division Interoffice Memorandum for guidance on review duration changes.

2.5.19	🍃 Hazardous Materials	:	0	04/22/2021	06/13/2022	418 days
2.5.19.1	Complete Env. Assessment / Initial Inclusion of Spec	:	0	04/22/2021	06/20/2021	60 da 🌲
2.5.19.2	 Submit for Hazmat Review 	:	0	06/20/2021	06/20/2021	0 days

2. Manually update the **Duration** by entering the required number or using the up/down arrows. A **red flag** will indicate any changes in dates and durations resulting from these modifications.

2.5.19	Hazardous Materials	:	0	04/22/2021	06/13/2022	418 days
2.5.19.1	Complete Env. Assessment / Initial Inclusion of Spec	:	0	04/22/2021	06/21/2021	61 da 🌲
2.5.19.2	 Submit for Hazmat Review 	:	0	06/21/2021	06/21/2021	0 days

- 3. Click anywhere on the screen to **Save**.
- 4. The Activity Duration Changes will be saved and the subsequent Date changes because of this Duration Change will be applied to the successor Activities and Milestones as well.

4.7.4 Logging Manual Update

Prerequisites:

1. If working in the Expanded view of the **Edit Schedule**, close the Expanded View Tab on the browser and navigate to the Project under the **Edit Schedule** tab.



 Click on the Refresh button under the Edit Schedule tab.
 Refer to <u>Viewing and Customizing the Edit Schedule</u> section for more details on Refresh. This step must be performed before Log Manual Update, regardless of whether the user was working in the Expanded View.

Log Manual Update the Baseline Schedule before submitting to the Project Manager.

To log it, follow the steps below:

- 1. Go to the **Project**
- 2. Go to Edit Schedule
- 3. Scroll up and locate the highest level of Schedule Template, i.e., where Schedule **Template** name is visible.

61	0665 - Edit Schedule	Q	\$ 🕈 Undo	← Previous Timespan
ID	+ Name			
	🍃 610665 - Edit Schedule			
1	Initiation-PRC			1
2	Design Bid Build (11/7/2024)			1
2.1	Contract/Project Management			1
2.1.1	🍃 Project Milestones			:

4. Click on the vertical ellipsis (three dots) and select Quick Actions

Design Bid Build (11/7/2024)	: 3 12/19/2019 10/2	21/2026 2499 days		
Contract/Project Management	Edit Information	1927 days		
Project Milestones	Discuss	<pre> ✓ Modify Date</pre>		
PRC Approval	Add	 Navigate To Activi 		
Issue Design Contract NTP	Delete	Mark Not Applica		
PM Submits Advertising Documents to FAPRO	Indent	Mark Applicable		
 Submit Title Sheet and Final Plans 				
 Prepare for Advertise 	Outdent	 Navigate To Project Add New Activity 		
 Project Readiness Date 	Clone	 Add New Activity Navigate to Activity 		
Advertise Construction Contract	External Dependency			
Release Bid Documents	Quick Actions	Łog Manual Upda Add Bridge Details		

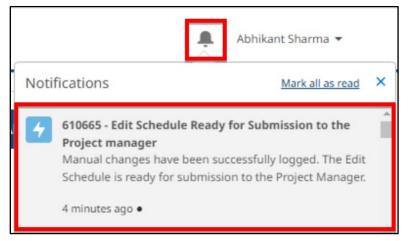
5. Click on the **Log Manual Update** quick action. A blank pop-up will briefly appear and then close automatically, as shown below.

2.1	Contract/Project Management	
2.1.1	Project Milestones	
2.1.1.1	 PRC Approval 	
2.1.1.2	 Issue Design Contract NTP 	
2.1.1.3	PM Submits Advertising Documents to FAPRO	
2.1.1.4	 Submit Title Sheet and Final Plans 	
2.1.1.5	Prepare for Advertise	
2.1.1.6	Project Readiness Date	la l
2.1.1.7	Advertise Construction Contract	
2.1.1.8	Release Bid Documents	
		> <

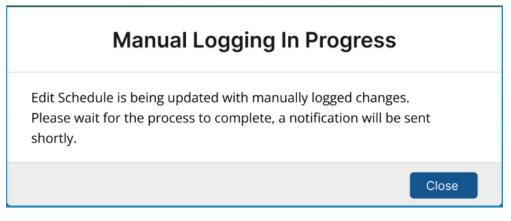
6. Upon completion, wait for the Log Manual Update process to finish.

Note: This process may take **two to five minutes**, depending on the number of proposed changes in the **Edit Schedule**

7. Upon completion of the process, the **Design Lead Contact** will receive a notification stating, **"Edit Schedule Ready for Submission to the Project Manager."**



Note: If the Baseline Schedule is submitted before the notification appears, the following screen will be displayed upon clicking **Submit Baseline Schedule**:



4.7.5 Submitting Baseline Schedule

Prerequisite: The **Design Lead Contact** clicked on the **Log Manual Update** Quick action for the Baseline Schedule and received the notification stating, **"Edit Schedule Ready for Submission to the Project Manager."**

Upon completing the **Log Manual Update** process for the Baseline Schedule, the External Design Lead Contact submits the Baseline Schedule for the Project Manager's approval.

To submit the Baseline Schedule:

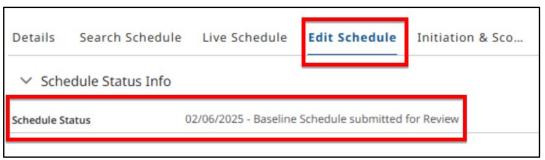
- 1. Go to the **Project**.
- 2. Go to Edit Schedule
- 3. Under the Edit Schedule > Schedule Status Info section, click Submit Baseline Schedule.

Details	Search Schedule	Live Schedule	Edit Schedule	Initiation & Sco
✓ Sche	edule Status Info			
Schedule St	tatus	02/06/2025 - Copy of L	ive Schedule added	to Edit Schedule tab
Submit E	Baseline Schedule			

4. A Green Success Message is displayed saying Baseline Schedule submitted successfully.



 The Schedule Status is updated to Today's date - Baseline Schedule submitted for Review. The Project Manager is notified of the submission by a Bell Notification and an email.



4.7.5.1 Discrepancies Screen in the Edit Schedule

Discrepancies in the Edit Schedule screen may be displayed while Submitting the Baseline Schedule, when there are some additional changes made on the Edit Schedule after the **Log Manual Update** is clicked.

For example, if a Design Lead Contact logs updates and submits the Edit Schedule for approval, & the **Discrepancies in the Edit Schedule** arise, follow the below steps:

- 1. Go to the **Project.**
- 2. Go to the Edit Schedule.
- 3. Under the Edit Schedule > Schedule Status Info section, click Submit Baseline Schedule.

Details	Search Schedule	Live Schedule	Edit Schedule	Initiation & Sco
✓ Sche	edule Status Info			
Schedule St	tatus	02/06/2025 - Copy of I	Live Schedule added	to Edit Schedule tab
Submit E	Baseline Schedule			

4. Click on **Save**.

Tinfo	Home P	Projects	Reports N	/ly Profile	Help Ma	nage Users			L	Abhik
			Di	screpa	ncies in	Edit Scl	hedule			
One o	r more discrepancies h	nave been f	ound between the r	manually Logo	ged Value(s) and ti	he Current Valu	e(s) on the Edit Schedu	le.		
If this is not accurate, please Cancel and correct the Logged Value(s) on the Edit Schedule. Otherwise, the Current Value(s) will overwrite the Logged Value(s) on Save.										
					ne con senedare.				55	
	Activity Group Nam	ie v	Activity Name	~	Edit Type	~	Logged Value(s)	~	Current Value(s)	~
1		ie v		~						
1	Activity Group Nam	ne 🗸 /7/2024)	Activity Name	√ Nanagement	Edit Type		Logged Value(s)		Current Value(s)	
1	Activity Group Nam Design Bid Build (11/	ne V (7/2024) (7/2024)	Activity Name Contract/Project N	√ Nanagement	Edit Type End Date		Logged Value(s) 05/09/2025		Current Value(s) 05/23/2025	
1	Activity Group Nam Design Bid Build (11/ Design Bid Build (11/	ne 🗸 (7/2024) (7/2024) (7/2024)	Activity Name Contract/Project N Contract/Project N	√ Nanagement	Edit Type End Date Duration		Logged Value(s) 05/09/2025 1970		Current Value(s) 05/23/2025 1984	

5. A green success message is displayed stating 'Discrepancies are being resolved. Resubmit the Baseline Schedule when ready'.

 \checkmark Discrepancies are being resolved. Resubmit the Baseline Schedule when ready. \succ

In case of **Monthly Schedule Update**, the message states '**Discrepancies are being** resolved. Resubmit the Schedule when ready.':



- 6. Wait for 2 to 3 Minutes then click the **Submit Baseline Schedule** button again.
- 7. A green success message is displayed stating 'Baseline Schedule submitted successfully'.

	ø	Baseline Schedule submitted successfully.	×
_			

 The Schedule Status is updated to Today's date - Baseline Schedule submitted for Review. The Project Manager is notified of the submission by a Bell Notification and an email.

Details	Schedule	Reports	Initiation & Scoping	Facility Info	Management				
Search	Schedule	Live Schedule	Edit Schedule						
∨ Sche	dule Status Inf	ō			_				
Schedule S	tatus	10/22/20	24 - Baseline Schedule s	ubmitted for Review					
Schedule R	eview Comment	t(s)							
Currently	Currently a schedule is being reviewed. No new edits can be made until the review is complete.								

4.7.6 Uploading the Schedule Narrative Document

A **narrative** outlining major issues, concerns, and explanation of any impacts on the project should accompany the **Proposed Schedule Updates** in the form of a document or a **Chatter post**.

The narrative can address:

- All the Activities Completed before the ProjectInfo Baseline Submission, that have been Manually Scheduled
- Status of each major deliverable
- Issues and proposed solutions
- Significant Meetings and Events
- Outstanding issues and critical actions required by the Designer, MassDOT or third parties.

Special attention should be given to any actions or issues that may impact **Project Milestones**. Any significant changes to the schedule, including those resulting from scope modifications or project development adjustments, must be clearly identified.

This document ensures that the **Project Manager** understands the rationale behind the adjustments and can plan accordingly.

To upload a Schedule Narrative, follow the steps below:

- 1. Go to the Project
- 2. Go to Edit Schedule
- 3. Click the View/Upload Schedule Narrative



- 4. The user is directed to a View/Upload Schedule Narrative section.
- 5. Click the Upload Schedule Narrative button.

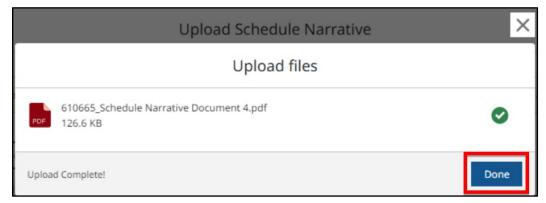
			1 Upload Schedule Narra	ative 🛃 Download Schedule Narrative
F				
	Document Name	× .	Accepted Schedule Date	~
	610665_Schedule Narrative Document 3.pdf		2/2/2025	
	610665_Schedule Narrative Document 2.pdf	;	2/2/2025	
	610665_Schedule Narrative Document 1.pdf		2/2/2025	
			2/2/2025	

An Upload Schedule Narrative pop-up displays.

6. Click the **Upload Files** button or **drop files** to upload the required document(s).

	Upload Schedule Narrative
NOTE: Once you upload a document, it au	tomatically gets saved and you will have to contact the system admin if any updates are needed.
▲ Upload Files Dr drop files	

7. Click Done



8. Click Save.

	Upload Schedule Narrative
NOTE: Once you upload a document, it	automatically gets saved and you will have to contact the system admin if any updates are needed.
▲ Upload Files Or drop files	

- 9. The uploaded document(s) are listed under the Schedule Narrative(s) section below the Document Name column. Once the proposed edits are accepted by the Project Manager, the accepted date will appear under the Accepted Schedule Date column. To view the document contents, the User has to select the check box(s) next to the document name and click the Download Schedule Narrative button. This will save a copy of the file(s) to the local drive.
- 10. Click **Close** to exit the current view. To view the **Schedule Narrative** again, click the **View/Upload Schedule Narrative** button.

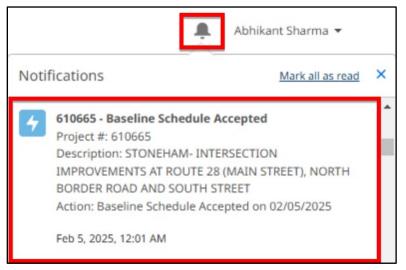
View	/Upload Schedule Narrative		Lyload Schedule Narrative Lyload Schedule Narrative
	Schedule Narrative(s)	~	Accepted Schedule Date
	610665_Schedule Narrative Document 4.pdf		
	610665_Schedule Narrative Document 3.pdf		2/2/2025
	610665_Schedule Narrative Document 2.pdf		2/2/2025
	610665_Schedule Narrative Document 1.pdf		2/2/2025
	610665_Schedule Narrative Document.pdf		2/2/2025

Note: Instead of uploading a **Schedule Narrative**, the External Design Lead Contact can also update the Project Manager using **Chatter** located on the Home Tab. Refer to the <u>Chatter</u> section for more details.

4.8 Baseline Schedule Accepted or Sent Back for Revision

4.8.1 Baseline Schedule Accepted

If the proposed Baseline Schedule is satisfactory, the Project Manager accepts the Baseline Schedule. The Design Lead Contact receives a Bell Notification and an Email notifying them of the Acceptance saying **Baseline Schedule Accepted**.



Once the **Baseline Schedule** is accepted, the application initiates the process of merging the proposed **Baseline Schedule** updates with the **Live Schedule**.Upon completion of the merging process, the **Design Lead Contact** will receive a Bell Notification stating, **"Schedule Updates Merged with Live Schedule."**

	÷	Abhikant Sharma 💌	
Notifi	ications	Mark all as read	×
4	610665 - Schedule Updates me Schedule The Live Schedule has been up Edits. Please verify updates in t Feb 3, 2025, 4:14 AM	dated with the Approved	•

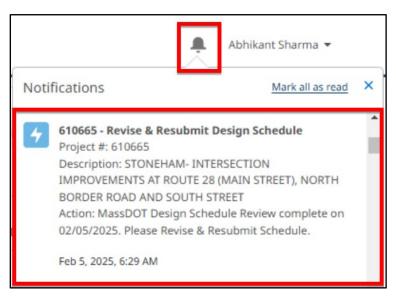
Upon receiving the notification, the External **Design Lead Contact** should navigate to the **Live Schedule** to verify that the **Baseline Schedule Updates** have been accurately merged under the **Live Schedule** tab.

Details	Search Schedule	Live Schedule	Edit Schedule
∨ Sche	edule Status Info		

4.8.2 Baseline Schedule Sent Back for Revision

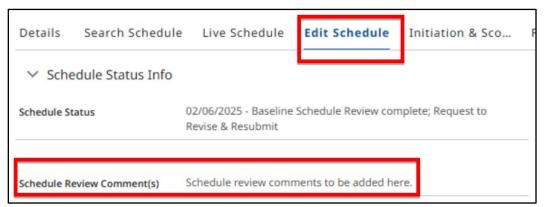
If the proposed Baseline Schedule is unsatisfactory, the Project Manager can send the Baseline Schedule back to **Revise and Resubmit** the Proposed Edits.

The Design Lead Contact receives a Bell Notification and an Email saying **Revise & Resubmit Design Schedule**.



The Design Lead Contact can view the Schedule Review Comments provided by the Project Manager following the steps below:

- 1. Go to the **Project**.
- 2. Go to Edit Schedule
- 3. Go to the Schedule Status Info section and locate the Schedule Review Comment(s) field.



- 4. The Design Lead Contact can collaborate with the Project Manager using **Chatter** as well if needed. Refer to the <u>Chatter</u> section for more details on using Chatter.
- 5. The Design Lead Contact can update the Edit Schedule submitted based on the Schedule Review Comments received from the Project Manager. Do not make another copy of the Live Schedule. After making the necessary updates, they can Log Manual Update and resubmit the Baseline Schedule to the Project Manager. Refer to sections Logging Manual Update and Submitting Baseline Schedule for more details.

4.9 Search Schedule

The Schedule Search page gives users the option to run a basic Schedule Search or use the Advanced Search option and export the project activities on the schedule as a report.

Go to the **Project > Search Schedule**.

Details	Search Sch	edu	Live Schedule	Edit Schedule	Initiation & So
	ADVANCED	SEARCH		Schedule Sea	rch
	Edit Search Fields	Save A		Search for an Activi	i ty Name Activity Name usir

4.9.1 Basic Schedule Search

To search for an activity on the schedule using an Activity Name:

1. Enter the Activity Name in the **Search for an Activity Name** field and click the **Search** button.

ADVANCED SEARCH	Schedule	e Search								
Edit Search Fields Save View As	Q, PRC M	Search for an Astivity Name. Q PRC Meeting - Search								
Default Search Views for Submit and Review activities are available for your use.		Project	Activities		C' Refr	resh	Export as CSV	+ Sele	ct More Fields	to Display
	•	Acti 🗸	Acti 🗸	Pare 🗸	Start	End	Dura 🗸	Pred \lor	Succ 🗸	% с 🗸
Select	1	Project Initiation Form (PIF) Approved	Initiation- PRC		07/02/20	07/02/20	0			0
1. Parent Activity Group		Pre-PRC							Submit to Project	

Search results will be displayed under the Projects Activities section.

Click the Activity Name or Activity Group to go to the Activity. The Projects Activities table has several Display Columns such as Activity Group, Start, End, Duration, Predecessor, Successor, % complete, etc. Use the + Select More Fields to Display button to customize the columns that users want to see.

	Search for an	Activity Name									
Edit Search Fields	Q. PRC Meeting Search										
Save View As											
Default Search Views for Submit and Review activities are available for your use.		Project Activities			C Refresh Export as CSV + Select More Fields to Display						
•		Activity Name 🗸 🗸	Activity Group \lor	Pare 🗸	Start	End	Dura 🗸	Pred \lor	Succ		
Search View Select	1	PRC Meeting	Initiation-PRC		07/01/2024	07/01/2024	0	Submit to Project Review Committee (PRC)	PRC Approva		
. Parent Activity Group Select Parent Activity Group	2	Post-PRC Meeting - (Designer & PM Assigned)	Initiation-PRC		08/25/2011	08/25/2011	0	Send PRC Approval Letter			

Note: Users have the option to export multiple Project Activities related information as a CSV file and Report. Refer to <u>Export Project Activities as a Report</u> section.

4.9.2 Advanced Search Panel

Within the Schedule Search, users have access to the **Advanced Search** panel, which allows them to filter and target their search results.

Users can enter information in various fields to narrow their search.

ADVANCED SEARCH		Scł	nedule	Search								
		Sear	ch for an	Activity Name				_				
Edit Search Fields Save View As	- 11	Q	Search	for an Activity Name usir	ng any keyword(s)		Search					
Default Search Views for Submit and Rev activities are available for your use.	iew		F	Project Activiti	es			C' Refresh	Export a	as CSV -	 Select More Fiel 	lds to Displa
Search View			_									
Select	•			Activity Name 🛛 🗸	Activity Group	V Parent V	/ Start	End	Durati 🗸	Predec \	✓ Succes ∨	% Co
1. Parent Activity Group			1	PRC Meeting	Initiation-PRC		07/01/2024	07/01/2024	0	Submit to Project Review Committee	PRC Approval	0
Select Parent Activity Group	•									(PRC)		
2. Activity Group			2	Post-PRC Meeting - (Designer & PM	Initiation-PRC		08/25/2011	08/25/2011	0	Send PRC Approval		0
Select Activity Group	•			Assigned)						Letter		
3. Activity Type												
Select Activity Type	•											
4. Activity Name												
5. Predecessor	_											

Some of the examples are:

• Users can select one or more **Parent Activity Groups** from the dropdown options.

ADVANCED SEARCH	Schedule Search
	Search for an Activity Nam
Edit Search Fields Save View As	Q Search for an Activi
Default Search Views for Submit and Review activities are available for your use.	-
Search View	Project
Select 🗸	Activity N
Select Parent Activity Group	Post-PRC 1 2 (Designer Assigned)
2. Activity Group	Assigned)
3. Activity Type	
Select Activity Type 🔻	
4. Activity Name	

• Users can enter the desired Activity Name in the Activity Name field.

Search for an Act	ivity Namo
Q Search for	,
Search 10	
E I	Project A
	ctivity Nam
	cervicy ivain
1 P	RC Meeting
2 (1	ost-PRC Mee Designer & F ssigned)
	issigned)
	1 P 2 ((

To adjust the Advanced Search fields, users can proceed by clicking the **Edit Search Fields** button on the left panel.

ADVANCED SEARCH		Scł	nedule	Search		
		Sear	ch for an /	Activity Name		
Edit Search Fields Save View As		Q	Search f	or an Activity Nar	me using any keyw	/ord(
Default Search Views for Submit and Review activities are available for your use.						
activities are available for your use.			The second secon	Project Act	tivition	
earch View				FIOJECT AC	uvities	
Select 💌				Activity \vee	Activity \lor	Pa
Durand Anti-Ity Course	-		1	Project Initiation Form (PIF) Approved	Initiation-PRC	
Select Parent Activity Group	ſ					
Select Parent Activity Group 🔹			2	Pre-PRC Evaluation	Initiation-PRC	
2. Activity Group				Meeting(s)		
Select Activity Group 🔹				Submit to		
. Activity Type			3	Project Review Committee (PRC)	Initiation-PRC	
				(FIC)		
Select Activity Type 🔹 🔻				PRC Meeting	Initiation-PRC	
			4			
Select Activity Type 4. Predecessor			4	, ,		
			4	PRC Approval	Initiation-PRC	

4.9.3 Export Project Activities as a Report

To export all the project activities on a Schedule as a report, follow the instructions below:

- 1. Go to the Project > Search Schedule.
- 2. Click the **Export as CSV** button.

ADVANCED SEARCH	Schedule Search							
Edit Search Save View Fields As	Search for an Activity Nar		any keyword(s)	Search				
Default Search Views for Submit and Review activities are available for your use.	Project	Activities	C' Re	fresh	Export as CSV	+ Sele	ct More Fields	to Display
Search View	Activ 🗸	Activ 🗸	Pare 🗸 Start	End	Dura \vee	Pred \vee	Succ \lor	% Co 🗸
Select 💌	Project Initiation Form (PIF) Approved	Initiation- PRC	06/19/2023	06/19/2023	0			0
I. Parent Activity Group Select Parent Activity Group	Pre-PRC 2 Evaluation Meeting(s)	PRC	06/16/2023	06/16/2023	0		Submit to Project Review Committee (PRC)	0

3. A Select Fields to Export pop-up displays.

Select the fields to display in exported CSV and click the **Export** button.

	²⁰³²⁰³	s to Export	X X M Accent	red
In Please select fields to display in e Display Fields	xported	I CSV: Selected Display Fields		111
WBS Bluebeam Session ID Owner Activity Sequence	•	Activity Name Activity Group Name Parent Activity Group Name Start End Duration	•	
Ca	ncel	Predecessor	•	Pre

4. A CSV file will be downloaded onto your local drive. Insert a row to add the project number and location, then rename the file before saving.

AutoSeve 💽 🗑 🏷 🤍 🥞 👻 Proje	ctActivitySearchExport_10	_8_2024-10_45_21 V	Search					inavolu, Ra	ihul I. (MTX)	8	a –	a	×
File Home Insert Draw Page Layout	Formulas Data	Review View Automate	Help							9	Comment	s 🖻 Sha	are ~
$ \begin{array}{ c c c c c } \hline & & & \\ \hline \\ \hline$		Wrap Text Merge & Center ~ 5 ~ %	• 158 -49 ber 15	Condition Formatting		Delete	~ 💵 ~		lect ~	sitivity sitivity	Add-ins	Analyze Data	
A1 * : × ✓ fx Activity Name													
AL · · · · · · · · · · · · · · · · · · ·													
A	В	C	D	E	F G	н	1.1	J	K	L	M	N	-
1 Activity Name	Activity Group	Parent Activity Group Name				s Successor		te					
Project Initiation Form (PIF) Approved	Initiation-PRC		7/2/2024	7/2/2024	0		0						
Pre-PRC Evaluation Meeting(s)	Initiation-PRC		7/1/2024	7/1/2024	0	Submit to	0						
4 Submit to Project Review Committee (PRC)	Initiation-PRC		7/1/2024	7/1/2024		E PRC Meeti	3						
5 PRC Meeting	Initiation-PRC		7/1/2024	7/1/2024		PRC Appre	0						
6 PRC Approval	Initiation-PRC		8/11/2011			ti Send PRC.	100						
Send PRC Approval Letter	Initiation-PRC			8/18/2011		rc Post-PRC I	100						
8 Post-PRC Meeting - (Designer & PM Assigned)	Initiation-PRC			8/25/2011		CApproval L	0						
New Permit Test			3/22/2027	4/2/2027	10		0						
0 PRC Approval	Project Milestones	Contract/Project Management		8/11/2011	0	Submit	100						
11 Issue Design Contract NTP	Project Milestones	Contract/Project Management			0 Review a		0						
2 PM Submits Advertising Documents to FAPRO	Project Milestones	Contract/Project Management			0 Submit	Submit	0						
3 Submit Title Sheet and Final Plans	Project Milestones	Contract/Project Management	11/2/2028	11/2/2028	0 PM	Project Re	0						
4 Prepare for Advertise	Project Milestones	Contract/Project Management		11/17/2028	11 PM	Advertise	0						
15 Project Readiness Date	Project Milestones	Contract/Project Management			0 Submit		0						
6 Advertise Construction Contract	Project Milestones	Contract/Project Management			1 Prepare	Release Bi	0						
7 Release Bid Documents	Project Milestones	Contract/Project Management	11/21/2028	11/21/2028	1 Advertise	e Contracto	0						
8 Contractor Prepare and Submits Bids	Project Milestones	Contract/Project Management	11/22/2028	1/3/2029	31 Release	B Bid Openi	0						
19 Bid Opening	Project Milestones	Contract/Project Management	1/4/2029	1/4/2029	1 Contract	o Constructi	0						
0 Construction Contract Award Process	Project Milestones	Contract/Project Management	1/5/2029	3/8/2029	45 Bid Oper	i Issue Con	0						
1 Issue Construction Contract NTP	Project Milestones	Contract/Project Management	3/8/2029	3/8/2029	0 Construc	tion Contra	0						
2 Consultant Prepare and Submits Proposal	Project Development	Project Development	11/7/2011	12/16/2011	30 Project S	c Review an	0						
3 Review and Approve Consultant Proposal and Schedu	Project Development	Project Development	12/19/2011	12/23/2011	5 Consulta	r Issue Des	0						
4 Conduct and Submit Survey	Civil Survey	Design	12/26/2011	3/16/2012	60 Issue De	s Submit	0						
5 Review Survey	Civil Survey	Design	3/19/2012	6/8/2012	60 Conduct	a Approval (0						
6 Approval of Survey	Civil Survey	Design	6/8/2012	6/8/2012	0 Review S		0						
7 Conduct and Submit Survey	Civil Survey.Rev1	Design	12/26/2011	3/16/2012	60		0						
8 Review Survey	Civil Survey.Rev1	Design	3/19/2012	6/8/2012	60		0						
9 Approval of Survey	Civil Survey.Rev1	Design	6/8/2012	6/8/2012	0		0						
	Ð				: •		-						Þ

4.10 Making Schedule Updates to the Live Schedule

External Design Lead Contacts can request the Project Manager to give them the edit access to the Live Schedule for making schedule updates.

To request the Project Manager to give Edit Access to the Live Schedule, send a Chatter or Email to the Project Manager asking them to provide the Edit Access to the Live Schedule. Please refer to **Chatter** section for the steps to send a chatter.

Once the Edit Access for the Live Schedule is given to the User by the Project Manager, the following notification is received -



Once received, navigate to the Live Schedule for the project for which the edit access is granted to you.

The other method to propose schedule updates is by creating a copy of the Live Schedule under the Edit Schedule Tab, similar to the steps for creating a Baseline schedule. For further details on how to create a copy under the Edit Schedule, consult the <u>Copying a Live Schedule</u> section.

After creating a copy of the Live Schedule, add a snapshot under the Edit Schedule before making schedule updates. A Snapshot should be added on the Edit Schedule to check the Total Slack and Delta between the End Dates, for comparing two versions of the Edit Schedule. Refer to the **Reviewing Total Slack** section for more details.

4.10.1 Proposing Updates on the Edit Schedule

Prerequisite: Before proposing **Schedule** updates, the **Baseline** should be approved by the Project Manager.

Note: The following updates are automatically saved in the **Edit Schedule** if a user logs out or is timed out:

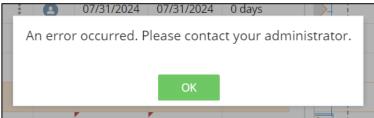
- 1. Activities Manually Scheduled
- 2. Changed End Dates and Durations
- 3. Activities marked as Not Applicable
- 4. New Activities/Activity Groups
- Dependency Changes [If a User believes the dependencies of an activity are incorrect, they should email Project Controls to verify them.]
 Important: Revised dates are not saved unless activity durations are updated or the Completed Activities are Manually Scheduled. Otherwise, dates will be driven by Schedule Logic

Users should avoid making the following changes on the Schedule:

Modifying the Template logic or dependencies incorporated (predecessors/successors)
 Note: If a User believes the dependencies of an activity are incorrect, they should email Project Controls to verify them.

- Modifying the **WBS** code Structure.
- Modifying FS relationships &/or adding lags.

Note: Attempting to edit any Activity if the percent is set to 100% will result in an admin error message as shown below:



The External Design Lead Contact can make updates to existing **Activity Groups**, **Activities**, and **Milestones**, or add new **Activity Groups**, **Activities**, or **Milestones** to the **Edit Schedule**.

4.10.2 Adding a Snapshot

A Snapshot should be added on the Edit Schedule to check the Total Slack and Delta between the End Dates, for comparing two versions of the Edit Schedule.

To add a **Snapshot**, follow the steps below:

- 1. Go to the **Project.**
- 2. Go to Schedule > Edit Schedule.
- 3. Click on the **Baseline** dropdown and select the **Save Schedule History** option.

ID	+ Name		0	Start	2019 2020	Save Schedule History			202	22	
ID.	TName			Start	Q3 Q4 Q1 Q2 C	Show Baseline	Q4	Q1	Q2	Q3 Q	4 Q
	610665 - Edit Schedule			07/18/2		Schedule History	-				_
1	Initiation-PRC	:	0	12/19/2	ion-PRC	< >) —				
1.1	 Project Initiation Form (PIF) Approved 	:	0	01/12/2							
1.2	 Pre-PRC Evaluation Meeting(s) 	:	0	01/09/2							
1.3	 Submit to Project Review Committee (PRC) 	:	0	01/09/2							
1.4	PRC Meeting	:	0	01/09/2							
1.5	 PRC Approval 	:	0	12/19/2	proval						
1.6	 Send PRC Approval Letter 	1	0	12/19/2	Letter						
17	Post-PRC Meeting - (Designer & PM Assigned)		0	12/24/2	timend)						

4. Enter a **Snapshot Title** and click **Add**.

1245				-	20	19		20	20			20	21			20	2		
ID	+ Name		(Q)	Start	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q
	🍃 610665 - Edit Schedule			07/18/2	-											_	_	_	=
1	Initiation-PRC	:	0	12/19/2	ion-PR	c i,													
1.1	 Project Initiation Form (PIF) Approved 	÷	0	01/12/2															
1.2	 Pre-PRC Evaluation Meeting(s) 	:	0	01/09/2															
1.3	 Submit to Project Review Committee (PRC) 	:	0	01/09/2															
1.4	PRC Meeting	:	0	01/09/2															

Note: When a new Snapshot is created, Schedule Update Start Date and Schedule Update End Date are added as the first two columns on the Edit Schedule. To hide those columns, Click on the Baseline dropdown and select Hide Baseline option.

Schedule	Schedule	ID	+ Name	2019 2020	Save Schedule History			202	2	
Scriedule	Schedule	10	Wante	Q3 Q4 Q1 Q2	C Hide Baseline	Q4	Q1	Q2	Q3 (Q4 Q
	· · · · ·		610665 - Edit Schedule		Schedule History	-				_
12/19/2019	01/12/2025	1	Initiation-PRC	ion-PRC	<					
01/12/2025	01/12/2025	1.1	 Project Initiation Form (PIF) Approved 							
01/09/2025	01/09/2025	1.2	 Pre-PRC Evaluation Meeting(s) 							
01/09/2025	01/09/2025	1.3	 Submit to Project Review Committee (PRC) 							
01/09/2025	01/09/2025	1.4	 PRC Meeting 							
12/19/2019	12/19/2019	1.5	 PRC Approval 	proval						
12/19/2019	12/19/2019	1.6	Send PRC Approval Letter	Letter						-
	12/24/2010		 Post-PRC Meeting - (Designer & PM Assigned) 	linead)						

4.10.3 Marking Activities/Activity Groups as Applicable/Not Applicable

Any activity or activity group that is out of scope for the project can be marked as **Not Applicable.** For further details, refer to the <u>Marking Activities/Activity Groups as Not</u> <u>Applicable</u> section.

If an Activity/Activity Group needs to be marked as **Applicable** again, Users can utilize the **Mark Applicable** quick action under the **Edit Schedule**.

To mark an Activity, Activity Group, Sub-Activity, or Milestone as Applicable:

- 1. Navigate to the required Activity/Activity Group on the Edit Schedule.
- Click the vertical ellipsis(three dots) > Quick Actions, and select the Mark Applicable Quick Action.

· · · · · · · · · · · · · · · · · · ·	•	•		00/11/20/2		
Wetland Resource Area Delineation	:	8	12/26/2011	04/27/2012	90 days	
Conduct and Submit Wetlands Delineation	:	0	12/26/2011	04/27/2012	90 days	
Functional Design Report		8	01/01/2013	10/01/2013	196 days	
Prepare and Submit Functional Design Report		9	01/01/2013	03/25/2013	🗲 Modify Date	
Review Functional Design Report	-		^			rt
 Accepted Functional Design Report 	Add			•	🗲 Navigate To Activi	Mark Not Applicable
Design Justification Workbook (DJW)	Delete	e		6	🗲 Mark Not Applica	
Prepare and Submit Draft DJW	Inden	t		Ċ	Mark Applicable	
Review Draft DJW	Outde	ent			🗲 Navigate To Project	t Mark Applicable
 Prepare and Submit Design Justification Wor 	Clone				🗲 Add New Activity	· k
Review Design Justification Workbook	Exterr	hal De	pendency			Vik -
Complete Streets Engineer Concurrence (DJW)	Quick	Actio	ns	Þ	🗲 Log Manual Update	e)
 District Project Development Concurrence (Section 2019) 	7		~		🗲 Add Bridge Details	

Note: When an Activity/Activity Group is marked as Applicable again, the Not Applicable sticker is removed. However, the Activity Duration and Dependencies (Predecessors/Successors) must be updated manually.

4.10.4 Adding Activity Groups

To add a **New Activity Group** on the Schedule, follow the steps below:

- 1. Locate an existing **Activity Group** below which the new Activity Group needs to be added.
- 2. Click on the vertical ellipses (three vertical dots)

2.5.6.2	 Noise Study Finalized and submitted with NEPA 	· O5/23/2021 06/21/2021	30 days ith NEPA
2.5.7	NEPA-Categorical Exclusion (CE)	i O3/24/2021 08/31/2022	526 days on (CE)
2.5.7.1	Prepare & Submit Draft CE	Edit Information	30 days Draft CE -
2.5.7.2	Review Draft CE	Discuss	30 days Draft CE
2.5.7.3	Prepare & Submit Final CE	Add	30 days : Final CE
2.5.7.4	Review Final CE	Delete	15 days Review Final CE
2.5.7.5	 Environmental App of Programmatic CE 	Indent	0 days FProgrammatic CE
2.5.7.6	 Submit Indv CE to FHWA 		0 days it Indv CE to FHWA
2.5.7.7	FHWA Review & Approval of Individual CE	Outdent	30 days oval of Individual CE
2.5.8	MEPA (ENF/EIR)	Clone	420 days :/EIR)
2.5.8.1	Prepare & Submit Draft MEPA ENF	External Dependency	180 days ENF
2.5.8.2	Prepare & Submit Draft MEPA EIR	Quick Actions	180 days A EIR

3. Click on **Quick Actions > Add New Activity Group**

2.5.6.2	Noise Study Finalized and submitted with NEPA	:	0	05/23/2021	06/21/2021	30 days	ith NEPA
2.5.7	NEPA-Categorical Exclusion (CE)	:	0	03/24/2021	08/31/2022	526 days	on (CE)
2.5.7.1	Prepare & Submit Draft CE	Edi	t Inform	ation	-	30 days)raft CE
2.5.7.2	Review Draft CE	Dis	cuss			30 days	Draft CE
2.5.7.3	Prepare & Submit Final CE	Add	đ		•	🗲 Modify Date	E
2.5.7.4	Review Final CE	Del	ete			🗲 Navigate To	Activi view Final CE
2.5.7.5	 Environmental App of Programmatic CE 		ent			🗲 Mark Not Ap	oplica mmatic CE
2.5.7.6	 Submit Indv CE to FHWA 					🗲 Mark Applica	able E to FHWA
2.5.7.7	 FHWA Review & Approval of Individual CE 		tdent			🗲 Navigate To	Project ndividual CE
2.5.8	MEPA (ENF/EIR)	Clo	ne			🗲 Add New Act	tivity
2.5.8.1	Prepare & Submit Draft MEPA ENF	Ext	ernal De	ependency		🗲 Navigate to A	Activity
2.5.8.2	Prepare & Submit Draft MEPA EIR	Qu	ick Actio	ns	Þ	🗲 Log Manual	Upda

4. Enter a **New Activity Group** name and select **Activities** needed under the new Activity Group

 Add New Activity Group *New Activity Group New Activity Group *Activities Prepare Submit Review Approval Start Date 	
	曲
Activity Review Discipline Design Traffic & Safety Bridge Utilities & Constructability	

 Select the Activity Review Discipline based on the section for which the new Activity Group is being added. For example, if adding a New Environmental Permit, the appropriate Activity Review Discipline to select would be Environmental.

	曲
* Activity Review Discipline	
Design	
Traffic & Safety Bridge	
Utilities & Constructability	
Environmental	
Right-of-Way	
* Stage Sticker	
None	;
WBS Code	
Event Code	

6. Select a Stage Sticker which is applicable for the New Activity Group and click Next.

Utilities & Constructability Environmental Right-of-Way	
* Stage Sticker Stage = 025%	;
WBS Code	
Event Code	
	Next

7. Once loading is complete, the new **Activity Group** will be displayed in the **Edit Schedule**.

2.5.8	🍃 New Activity Group	:	0	08/22/2022	08/31/2022	10 days
2.5.8.1	 Prepare New Activity Group 	:	0	08/22/2022	08/31/2022	10 days
2.5.8.2	 Submit New Activity Group 	:	0	08/22/2022	08/31/2022	10 days
2.5.8.3	 Review New Activity Group 	:	0	08/22/2022	08/31/2022	10 days

8. Update the **Dependencies** (Predecessors and Successors) if it is not a linear dependency. Refer to the <u>Editing Dependencies</u> section.

- 9. To update more information, click the **Vertical Ellipsis** > **Edit Information** for the Activities under the New Activity Group.
- 10. A pop-up for the selected Activity displays. Locate the **Activity Info** and update the **Assign an Owner, Start Date**, and **Due Da**te fields.

Activity Info	Category:	
Status	Default	~
🕓 Log Time	Title:	
🚺 Risk	Review Survey	
1 Subscribers	Description: HWY.303.030	
📃 Custom Fields	1101.000	
Resource	Assign an Owner: Priority:	
Activity Mode		~
Stickers	Start Date: Due Date:	_
System - Do Not Use	Mar 26 2012 🗐 Jun 15 2012	Ĩ
	Duration:	
	60 days	
	Delete Save	

Note: Users should assign the Project Manager as the **Owners** for new activities. Users who are assigned as the owners are responsible for actualizing the completed activity on the **Live Schedule**.

11. Locate the Custom Fields and update WBS Code and then click Save.

Prev			
		Activity Info	Is Activity Group:
203	٢	Status	Task Type:
203	()	Log Time	
202		Risk	Area of Work:
202	Ŀ	Subscribers	
202	≡	Custom Fields	Schedule Change:
202	0	Resource	· · · · · · · · · · · · · · · · · · ·
202	111	Activity Mode	Review Section:
202	•	Stickers	WBS Code:
202	5	System - Do Not Use	CNT.MS.040
'202 '202			Event Code:
202			
203			Markup Folders Not Needed:
			Delete Save

Note: The **WBS Structure** has been carefully developed to reflect the Area of Work and the Division/Subdivision of Work as defined in the Scoping Workbook. The **WBS Structure** should not be modified under any circumstances. Reach out to Project Controls using Chatter if any questions regarding WBS Codes for New Activity Groups.

- 12. Similarly, update the **WBS Code** for all the Activities/Milestones under the New Activity Group.
- 4.10.5 Adding a new Activity under Activity Group (Activity, Milestones, Sub Activity, and Sub Activity Group)

Various activities can be added under, above, and below an Activity Group. The below image shows the various tasks on the Schedule. The type can be differentiated by the icon next to the Name.

Activity Gro	Article 97 Proceedi	05/13/2027	05/13/2027
3.6.4.3.1	Article 97 Proc	05/13/2027	05/13/2027
4	Bridge Test	⁰⁹ Sub Activ	vity Group
Sub Activity	🍃 Bridge Group 🚦	09/09/2024	05/05/2024
4.2	 Bridge Sub Activity 	09/09/2024	lestone
4.3	♦ Bridge Milestone	09/02	lestone
5	Bridge New Activity Below	09/09/2024	09/09/2024
4			
	A	ctivity Below	

1. To add, go to the required **Activity Group** and click the **vertical ellipsis** > **Add** > then click on the required option from the dropdown.

5.0.4.1.2	 Prepare and 5 	: 05/14/2027	09/16/2027	90 days		
3.6.4.1.3	 Review and Ap 	09/17/2027	11/18/2027	45 days		
3.6.4.1.4	 Offer, Negotiat 	Edit Information	00,000,0000	65 days		
3.6.4.1.5	 Payment; Issue 			90 days		
3.6.4.2	🍃 Municipal ROW Ac			2480 dave		
3.6.4.2.1	 Initial Muni Ac 	Add	· · · · · ·	Activity Above		
3.6.4.2.2	 Prepare and S 	Delete	Activity Below			
3.6.4.2.3	 Review and Ap 	Indent	Sub Activity			
3.6.4.2.4	 Final Muni Acq 	Outdent		Sub Activity Group		
3.6.4.2.5	Issue ROW Cer	Clone	(3)	Milestone		
3.6.4.3	🍃 Article 97 Proceedi	External Dependency	Ŭ	0 days		
3.6.4.3.1	 Article 97 Proc 	Quick Actions	+	0 days		
4	🍃 Bridge Test	09/09/2024	09/09/2024	1 day		

Options Action on selection		
Activity Above	An Activity is added above the selected Activity Group	
Activity Below	An Activity is added below the selected Activity Group	
SubactivityA Sub-Activity is added under the selected Activity Group		
Subactivity Group	A Sub-Activity Group is added under the selected Activity Group	
Milestone	A Milestone is added under the selected Activity Group	

- 2. The newly added **Activity** will be shown on the Schedule. Double-click the Activity to rename it.
- 4.10.6 Updating Activity Durations

Under the **Edit Schedule**, the Design Lead Contact can propose **Duration** changes for the Activities. Refer to the <u>Updating Activity Durations</u> section for more details.

4.10.7 Editing Dependencies

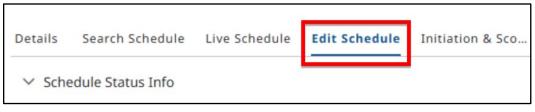
The Design Lead Contact can propose **Dependency (Predecessors/Successors)** changes under the **Edit Schedule**. Refer to the <u>Editing Dependencies</u> section for more details.

4.10.8 Adding Resubmission Activity Group

Resubmissions are primarily applicable to **Design Packages** but may not be relevant to all **Activity Groups**.

For example, to add **25% Design Package** as a **Resubmission Activity Group**, follow the steps below:

- 1. Go to the **Project**.
- 2. Go to the Edit Schedule.



- 3. Locate the **25% Design Package** Activity Group.
- 4. On the Activity Group, click the vertical ellipsis (three dots) and select Add resubmission Quick action.

🍃 25% Design Package	01/23/2021	11/05/2021	287 days		
Prepare & Submit 25% Design Submission	Edit Information		60 days		
 Send to FHWA (if PODI) 	Discuss		 ✓ Modify Dat 	te	
Review 25% Design Submission & Comments to DE	∳ Navigate Television				
Prepare 25% Design Responses	🗲 Mark Not A	Applica			
Schedule & Conduct Comment Resolution Meeting @25	🗲 Mark Applicable				
Utility Coordination	Indent		🗲 Add New A	ctivity	
Subsurface Utility Exploration	Outdent		🗲 Log Manua	al Upda	
 Schedule & Conduct Utility Early Coordination Field Meet 	Clone		🗲 Add Bridge	Details	
Prepare Force Account Agreements	External Dependency		🗲 Add Resub	mission	
Prepare PUC Form	Quick Actions		🗲 Navigate Te	o Project	

5. Click on Add

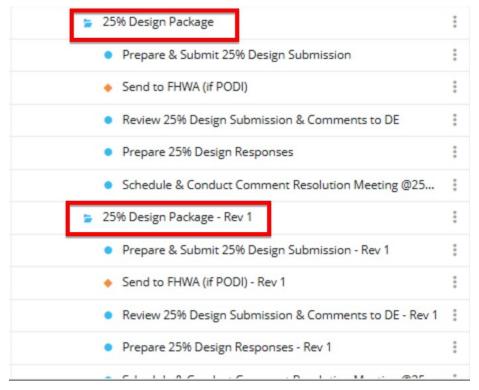
Activity Group to copy	25% Design Package
New Activity Group	25% Design Package - Rev 1
Revision Number	1

6. Click on Close

Add New Resubmission Activity Group

Resubmission Activity Group added successfully.	
	Close

7. The Resubmission Activity Group is added below the original Activity Group.



4.10.9 Reviewing Total Slack and Critical Path

To review the **Critical Path** &/or **Total Slack** for Activities on the **Edit Schedule**, the Design Lead Contact must create a **Snapshot** under the **Edit Schedule**. Creating a **Snapshot** updates the **Total Slack** and **Critical Path**, ensuring the most current values are reflected.

4.10.9.1 Adding a Snapshot

To add a **Snapshot**, follow the steps below:

- 5. Go to the Project.
- 6. Go to **Schedule > Edit Schedule.**
- 7. Click on the **Baseline** dropdown and select the **Save Schedule History** option.

ID	+ Name		<u>()</u>	Start	2019 2020	Save Schedule History				20	22	
0	THE			Store	Q3 Q4 Q1 Q2 Q	Show Baseline		Q4	Q1	Q2	Q3	Q4
	🖕 610665 - Edit Schedule			07/18/2	-	Schedule History						
1	Initiation-PRC	:	0	12/19/2	ion-PRC	•	•	F				
1.1	 Project Initiation Form (PIF) Approved 	:	0	01/12/2								
1.2	 Pre-PRC Evaluation Meeting(s) 	:	0	01/09/2								
1.3	 Submit to Project Review Committee (PRC) 	:	0	01/09/2								
.4	 PRC Meeting 	:	0	01/09/2								
1.5	 PRC Approval 	:	0	12/19/2	proval							
.6	 Send PRC Approval Letter 	:	0	12/19/2	Letter							
. 7	 Post-PRC Meeting - (Designer & PM Assigned) 		•	12/24/2								

8. Enter a Snapshot Title and click Add.

	1					0.0		19		20	20			20	21			20	2		
ID	+ Name		@···	Start	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1		
	🝃 610665 - Edit Schedule			07/18/2	F												_		=^		
1	Initiation-PRC	:	0	12/19/2	ion-PR	c Ç															
1.1	 Project Initiation Form (PIF) Approved 	:	0	01/12/2																	
1.2	 Pre-PRC Evaluation Meeting(s) 	:	0	01/09/2																	
1.3	 Submit to Project Review Committee (PRC) 	:	0	01/09/2																	
1.4	PRC Meeting	:	0	01/09/2																	

Note: When a new Snapshot is created, Schedule Update Start Date and Schedule Update End Date are added as the first two columns on the Edit Schedule. To hide those columns, Click on the Baseline dropdown and select Hide Baseline option.

Schedule	Schedule	ID	+ Name	2019 2020	Save Schedule History	il		2022	
scrieddle	schedule	10	IName	Q3 Q4 Q1 Q2	Hide Baseline	Q4	Q1 (Q2 Q3	Q4 (
			🍃 610665 - Edit Schedule	-	Schedule History				
12/19/2019	01/12/2025	1	Initiation-PRC	ion-PRC	<				
01/12/2025	01/12/2025	1.1	 Project Initiation Form (PIF) Approved 						
01/09/2025	01/09/2025	1.2	 Pre-PRC Evaluation Meeting(s) 						
01/09/2025	01/09/2025	1.3	 Submit to Project Review Committee (PRC) 						
01/09/2025	01/09/2025	1.4	 PRC Meeting 						
12/19/2019	12/19/2019	1.5	 PRC Approval 	proval					
12/19/2019	12/19/2019	1.6	 Send PRC Approval Letter 	Letter					
	12/24/2010		 Post-PRC Meeting - (Designer & PM Assigned) 	imad)					

4.10.9.2 Reviewing Total Slack

Total Slack determines the number of days a Schedule Activity can be delayed without impacting the Schedule End Date (i.e. the **Construction Contract NTP Date**).

To review the Total Slack of Activities on the Edit Schedule, follow the steps below:

1. Click on the + icon near **Name** on the top left of the **Edit Schedule** and select the **Add New Column** option.

61	0665 - Edit Schedule	% Done	🕈 Undo	+
ID	+ Name	Assigned Resources		(
	add Activity	Category		
1	Add Activity Group	Custom Fieldset	:	6
1.1	Add Milestone	Description	:	
1.2	Add New Column	Discuss	:	6
1.3	 Submit to Project Revi 	^e Elapsed Time	1	6
1.4	 PRC Meeting 	On Hold	:	e

2. Click on Custom Fieldset and select Slack

565 -	Edit Schedule	% Done	🕈 Undo		← Previou
+	Name	Assigned Resources			@···
5 6	Add Activity	Category			
2	Add Activity Group	Custom Fieldset	Slack		
	Add Milestone	Description		:	0
	Add New Column	Discuss		:	0
	 Submit to Project Revie 	Elapsed Time		:	0
	 PRC Meeting 	On Hold		:	0

3. A column for **Total Slack (In Days)** is added on the **Edit Schedule** which displays the **Total Slack of the Activities**.

				-			Slack	
+ Name			<u>@</u>	Start	End	Duration	Total (ln	Delta (In
	 Submit Litle Sneet and Final Plans 	:	Θ	09/30/2024	09/30/2024	0 days	651	U
5.0 2.0	 Prepare for Advertise 	1	0	10/01/2024	10/11/2024	11 days	651	0
14	 Project Readiness Date 	:	0	10/11/2024	10/11/2024	0 days	93	0
	Advertise Construction Contract		0	10/12/2024	10/12/2024	1 day	93	0
	P.I. Did D		-					-

4. Along with **Total Slack**, the Design Lead Contact can also check the **Delta (In Days)** for all the Activities. Delta shows the change in **Slack** for the Activities because of the schedule updates proposed, in comparison to the Baseline Schedule.

0100	665 - Edit Schedule 🔍 🗲 🦘 Undo		FIEVIOL	ıs Timespan	→ Next Tin	lespan	Baseline 🗸	Show 🗸
ID	+ Name			-	End	Duration	Slack	
	+ Name		<u>@</u>	Start	End	Duration	Total (In	Delta (ln
2.5.2.4	Review Final ERC	÷	Θ	03/24/2021	04/22/2021	30 days	703	0
2.5.3	Historic / Archeology (Section 106) Review	÷	0	03/24/2021	09/30/2021	191 days	1354	-10
2.5.3.1	 Conduct Historic Impact Analysis 	÷	0	03/24/2021	05/02/2021	40 days	1354	-10
2.5.3.2	Perform & Submit Arch Survey	÷	0	05/03/2021	07/01/2021	60 days	1354	-10
2.5.3.3	Review Arch Survey	÷	0	07/02/2021	07/31/2021	30 days	1354	-10
2.5.3.4	 No Effect Finding (NEF) Determined 	:	0	08/01/2021	08/30/2021	30 days	1541	-10
2.5.3.5	 No Adverse Effect Finding (NAE) 	:	0	08/01/2021	08/30/2021	30 days	1354	-10

4.10.9.1 Reviewing Critical Path

Critical Path on a Schedule displays the Activities with their *Total Slack as less than or equal to 10 days*. A **Critical Path (CP)** sticker is added on the schedule activities, filtering on which Critical Path can be viewed.

When reviewing the schedule logic, special attention should be paid to the **Critical Path**. The **Critical Path** is the longest sequence of Activities in the Project. Delays to Activities on this path will delay the Project completion. Users must ensure that the **Critical Path** along with the sequence of activities in it, align with the intended approach of the Project implementation.

To review the Activities on the Critical Path on the Edit Schedule:

 Click on the + icon next to Name on the top left corner and select the Add New Column option

61066	5 - Edit Schedule	Category	
D	+ Name	Custom Fieldset	•
2.1.1.1	Add Activity	Description	
2.1.1.11	Add Activity Group	Discuss	
2.1.1.12	Add Milestone	Elapsed Time	
2.2	Add New Column	On Hold	
2.2.1		Predecessors	
2.2.2	 Review and Approve 	Priority	d Schedu
2.3	Design	Risk	
2.3.1	 Civil Survey Conduct & Subr 	Sequence	1.00
2.3.1.2	 Review & Appro 	Stickers	-

2. Select Stickers

3. Click the **Refresh** Button.

Note: The schedule requires a **Refresh** to display the added **Stickers**. Therefore, reviewing the **Critical Path**, ensure to click on the **Refresh** button.

Edit Schedule	Initiation & Sco	Facility Info	Management	Review	Documents	Communication	More
of Live Schedule added	- to Edit Schedule tab						
					£	View/Upload Schedule	Narrative
				Viev	v Proposed Schedu	le Edits Disabled	Refresh

4. The Activities which are on the **Critical Path** will display a **Critical Path (CP)** sticker under the **Stickers** column.

		0	Farmer	Fred	Duratian	Stickers	Sla
ame	Q		Start	End	Duration	Stickers	Tot
75% Right of Way State	:	0	10/21/2021	06/16/2022	239 days	CP MU	0
🍃 75% Right of Way State	:	0	10/21/2021	01/18/2022	90 days	CP MU	-1
Prepare & Submit 75% ROW Plans	:	0	10/21/2021	11/19/2021	30 days	ми	30
 Review 75% State ROW Plan & Comm 	:	0	12/20/2021	01/18/2022	30 days	CP MU	-1
🍃 75% Right of Way State Rev 1	:	0	01/19/2022	03/19/2022	60 days	CP MU	-1
 Prepare & Submit 75% ROW Plans 	:	0	01/19/2022	02/17/2022	30 days	CP MU	-1

 The Schedule Activities can also be filtered by applying a filter to the Critical Path sticker. Refer to the <u>Viewing and Customizing the Edit Schedule</u> section for more details.

4.10.9.2 Reviewing End Date Delta

Note: Add a Snapshot on the Edit Schedule for reviewing the End Date Delta

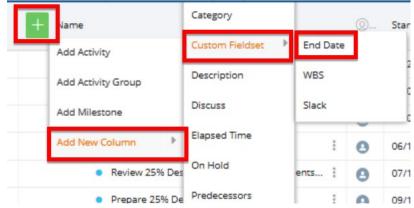
End Date Delta is the difference between the End Dates of the Schedule Activities between the first snapshot and the latest snapshot taken on the Edit Schedule. **End Date Delta** = (End Date of the Activity in the First Snapshot taken after creating a Copy) - (End Date of the Activity in the Latest Snapshot).

To review the End Date Delta **of Activities on the Edit Schedule**, follow the steps below:

1) Click on the + icon near Name on the top left of the Edit Schedule and select the Add New Column option.

610	0665 - Edit Schedule	% Done	♣ Undo ← I
ID	+ Name	Assigned Resources	(
3	😑 6 Add Activity	Category	
1	Add Activity Group	Custom Fieldset	: (
1.1	Add Milestone	Description	E (
1.2	Add New Column	Discuss	: 6
1.3	 Submit to Project Review 	Elapsed Time	1.6
1.4	PRC Meeting	On Hold	: 6

2) Click on Custom Fieldset and select End Date



3) A column for End Date Delta is added on the Edit Schedule which displays the Delta between the End Dates

	Q	Start	End	Duration	%	End Date Delta (In
Revise and Resubmit Final RSA Report	. 0	05/25/2024	05/25/2024	0 days	0	0
25% Design Package	: 0	03/07/2025	10/13/2025	221 days	0	-10
Prepare & Submit 25% Design Submission	: 0	03/07/2025	06/14/2025	100 days	0	-10
 Send to FHWA (if PODI) 	• •	06/14/2025	06/14/2025	0 days	0	-10
 Review 25% Design Submission & Comments 	• •	07/15/2025	08/28/2025	45 days	0	-4
 Prepare 25% Design Responses 	• •	09/13/2025	09/22/2025	10 days	0	-10
Schedule & Conduct Comment Resolution M	: 0	09/23/2025	10/13/2025	21 days	o	-10

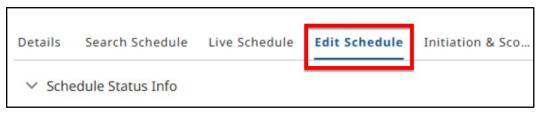
4.10.9.3 Reviewing Ad Date on the Edit Schedule Gantt Chart

Please refer to the <u>Reviewing Ad Date on the Edit Schedule Gantt Chart</u> section for the steps to view the Ad Date for a Project under the Edit Schedule.

4.10.10 Viewing Schedule History

The **Schedule History** provides a snapshot of the Baseline Schedule and/or a snapshot of subsequent updated Schedules. To view the Schedule History, follow the steps below:

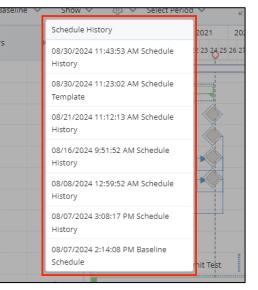
- 1. Go to the **Project.**
- 2. Go to the Edit Schedule.



3. On the Edit Schedule, click the down arrow next to Baseline and select the Schedule History option.

mespan →	Next Timespa	in	Baseline 🗸 Show 🔪	 () V Select Period
	-		Save Schedule History	2011 2016 2
Predecess	Successors Stick		Hide Baseline	13 14 15 16 17 18 19 20 21 22
			Schedule History	
			4 U	•
		СР	0	tiation Form (PIF) Approved
	5	СР	0	e-PRC Evaluation Meeting(s)
4	6	СР	3	ect Review Committee (PRC)

4. A **Schedule History** pop-up will be displayed.



When the user clicks on the **Schedule History** snapshot, columns for the schedule's **Start Date** and **End Date** will be added. This allows the user to compare the data and manually reconstruct or update the schedule as needed.

	dule Update tart Date		Schedule Update End Date ← Previous Timespan → Next Timespan	Baseline
Schedule	Schedule	ID	+ Name	Start
	Schedule	Update End Da	Plan Board(999911)	07/31/2024
07/31/2024	08/05/2024	1	Initiation-PRC	07/31/2024
08/04/2024	08/04/2024	1.1	Project Initiation Form (PIF) Approved	08/04/2024
07/31/2024	07/31/2024	1.2	Pre-PRC Evaluation Meeting(s)	07/31/2024
07/31/2024	07/31/2024	1.3	Submit to Project Review Committee (PRC)	07/31/2024
07/31/2024	07/31/2024	1.4	PRC Meeting	07/31/2024
07/31/2024	07/31/2024	1.5	PRC Approval	07/31/2024
07/31/2024	07/31/2024	1.6	◆ Send PRC Approval Letter	07/31/2024
08/05/2024	08/05/2024	1.7	Post-PRC Meeting - (Designer & PM Assigned)	08/05/2024
		2	Design Bid Build (7/12/2024)	07/31/2024

4.10.11 Logging Manual Updates

Prerequisites:

1. If working in the Expanded view of the **Edit Schedule**, close the Expanded View Tab on the browser and navigate to the Project under the **Edit Schedule** tab.



2. Click on the **Refresh** button under the **Edit Schedule** tab.

Refer to <u>Viewing and Customizing the Edit Schedule</u> section for more details on **Refresh**. This step must be performed before **Log Manual Update**, regardless of whether the user was working in the Expanded View.

If the user proposes updates to an Activity/Activity Group manually, the update must be **Logged as a Manual Update** under the Edit Schedule.

To Log Manual Update an Activity/Activity Group, follow the steps below:

- 1. Go to the **Project**
- 2. Go to Edit Schedule
- 3. For the Activity Group/Activity updated, click the vertical ellipsis (three vertical dots)

2.3.9	🍃 25% Design Package - Rev 1	:
2.3.9.1	Prepare & Submit 25% Design Submission	:
2.3.9.2	 Send to FHWA (if PODI) 	:
2.3.9.3	Review 25% Design Submission & Comments to DE	:
2.3.9.4	Prepare 25% Design Responses	:
2.3.9.5	 Schedule & Conduct Comment Resolution Meeting @25% (Full Team) 	:

4. Click on Quick Actions and Select Log Manual Update.

2131013	8		TO WE DE I	21 0035
2.3.9	🍃 25% Design Package - Rev 1	: 01/22/2021 1	1/04/2021	287 days
2.3.9.1	Prepare & Submit 25% Design Submission	Edit Information		60 days
2.3.9.2	 Send to FHWA (if PODI) 	Discuss		0 dave
2.3.9.3	Review 25% Design Submission & Comments to DE	Add	•	
2.3.9.4	Prepare 25% Design Responses	Delete		 Navigate To Activi.
2.3.9.5	 Schedule & Conduct Comment Resolution Meeting @25% (Full Team) 	Indent		 Mark Not Applica
2.3.10	Utility Coordination	Outdent		 Mark Applicable Mariana Ta Davia
2.3.10.1	Subsurface Utility Exploration			
2.3.10.2	Schedule & Conduct Utility Early Coordination Field Meeting	Clone		 Add New Activity
2.3.10.3	Prepare Force Account Agreements	External Dependency		✓ Navigate to Activity
2.3.10.4	Prepare PUC Form	Quick Actions	*	✓ Log Manual Upda.
				Add Bridge Details

5. A blank pop-up will briefly appear and then close automatically, as shown below.

2.1	Contract/Project Management	
2.1.1	Project Milestones	
2.1.1.1	 PRC Approval 	
2.1.1.2	 Issue Design Contract NTP 	
2.1.1.3	PM Submits Advertising Documents to FAPRO	
2.1.1.4	 Submit Title Sheet and Final Plans 	
2.1.1.5	Prepare for Advertise	
2.1.1.6	Project Readiness Date	¹
2.1.1.7	Advertise Construction Contract	
2.1.1.8	Release Bid Documents	

After logging a manual update, a **Manual Update (MU)** sticker will be automatically added to the selected Activity Group/Activity.

6. Click Refresh.

Note: The schedule requires a **Refresh** to display the added **Stickers**. Therefore, when reviewing the **Manual Update** Sticker, ensure to click on the **Refresh** button.



- 7. To view the **Manual Update** stickers on the **Edit Schedule**, Click the **+** icon at the top left of the **Edit Schedule**.
 - Custom Fieldset ID Name Add Activity Description 2.3.3.1 Add Activity Group 2.3.4 Discuss 2.3.4.1 Add Milestone Elapsed Time 2.3.4.2 Add New Column On Hold 2.3.5 Design Justification Predecessors Prepare & Subm 2.3.5.1 Priority 2.3.5.2 Review Draft DJV Risk Prepare & Subm 2.3.5.3 Sequence 2.3.5.4 Review Design J Stickers 2.3.5.5 Complete Street Successors
- 8. Select Add New Column > Stickers from the dropdown.

A **Stickers** column will be added to the Schedule displaying the **Manual Update(MU)** stickers that have been applied to Activities and the **Activity Group** that are **Logged Manual updates**.

2.3.9	🍃 25% Design Package - Rev 1	:	0	01/22/2021	11/04/2021	287 days	MU
2.3.9.1	Prepare & Submit 25% Design Submission	:	0	01/22/2021	03/22/2021	60 days	MU
2.3.9.2	 Send to FHWA (if PODI) 	:	0	03/22/2021	03/22/2021	0 days	MU
2.3.9.3	Review 25% Design Submission & Comments to DE	:	0	07/07/2021	10/04/2021	90 days	MU
2.3.9.4	Prepare 25% Design Responses	÷	0	10/05/2021	10/14/2021	10 days	MU
2.3.9.5	 Schedule & Conduct Comment Resolution Meeting @25% (Full Team) 	1	0	10/15/2021	11/04/2021	21 days	MU

4.10.12 Submitting Schedule Update

Once the proposed updates are completed and are **Logged Manual Updates** on the **Edit Schedule** tab, the External Design Lead Contact can submit the proposed changes for the Project Manager's approval.

To submit the proposed changes:

- 1. Go to the Project
- 2. Go to Edit Schedule
- 3. Under the Schedule Status Info section, click Submit Schedule Update.

Details	Search Schedule	Live Schedule	Edit Schedule	Initiation & Sco
✓ Sche	edule Status Info			
Schedule St	atus	02/06/2025 - Copy of	Live Schedule added	to Edit tab
Submit S	chedule Update			

4. The Schedule Status will be updated to Today's Date - Schedule Submitted for review. The associated Project Manager is notified with a Bell Notification and an email.

PROJECTinfo	Home	Projects	Rep	Scł	nedule update subm	itted successfu	ılly. X
Details Search Schee	dule Live	Schedule	Edit Sche	dule	Initiation & Sco	Facility Info	Management
✓ Schedule Status In	fo						
Schedule Status	02/06/2	025 - Schedule	e Submitted fo	or reviev	1		

4.10.13 Discrepancies Screen in the Edit Schedule

For Example: When the Duration is changed for an Activity, it might impact the Start/End Date(s) of its successor(s), which was already Logged as a Manual update earlier. Refer to the <u>Discrepancies Screen in the Edit Schedule</u> Section for more details.

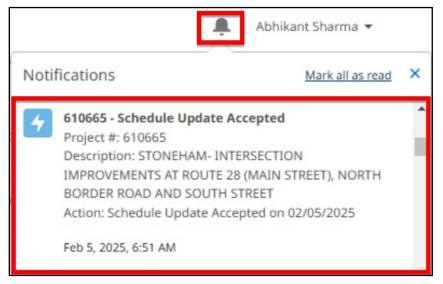
4.10.14 Uploading the Schedule Narrative Document

A narrative addressing major issues and concerns as well as an explanation of any impacts to the Project should be submitted with the Proposed Schedule update via a document or a **Chatter** post. Refer to the <u>Uploading the Schedule Narrative Document</u> section for more details.

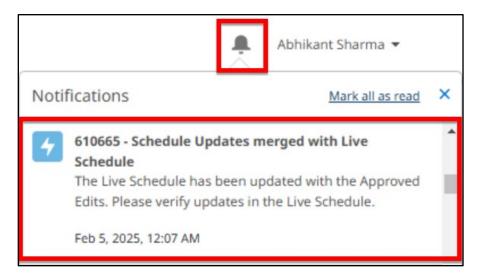
4.11 Schedule Update Accepted or Sent Back for Revision

4.11.1 Schedule Update Accepted

If the proposed Schedule Update(s) are satisfactory, the Project Manager accepts the Schedule Update(s). The Design Lead Contact receives a Bell Notification and an Email notifying them of the Acceptance saying **Schedule Update Accepted**.



Once the **Schedule Update(s)** are accepted, the application initiates the process of merging the proposed **Schedule Update(s)** with the **Live Schedule**. Upon completion of the merging process, the **Design Lead Contact** will receive a Bell Notification stating, **"Schedule Updates Merged with Live Schedule."**



Upon receiving the notification, the **Design Lead Contact** should navigate to the **Live Schedule** to verify that the **Schedule Update(s)** have been accurately merged under the **Live Schedule** tab.

Details	Search Schedule	Live Schedule	Edit Schedule
✓ Sche	edule Status Info		

4.11.2 Schedule Update Sent Back for Revision

If the proposed Schedule Update(s) are unsatisfactory, the Project Manager can send the Schedule Update(s) back to **Revise and Resubmit** the Proposed Edits.

The Design Lead Contact receives a Bell Notification and an Email saying **Revise & Resubmit Design Schedule**.

	Abhikant Sharma 🔻
Notifications	Mark all as read ×
Project #: 610665 Description: STOI IMPROVEMENTS BORDER ROAD A Action: MassDOT	Resubmit Design Schedule NEHAM- INTERSECTION AT ROUTE 28 (MAIN STREET), NORTH ND SOUTH STREET Design Schedule Review complete on se Revise & Resubmit Schedule.

The Design Lead Contact can view the Schedule Review Comments provided by the Project Manager following the steps below:

- 1. Go to the **Project**.
- 2. Go to the Edit Schedule
- 3. Go to the Schedule Status Info section and locate the Schedule Review Comment(s) field.

Details	Search Schedule	Live Schedule	Edit Schedule	Initiation & Sco
✓ Sche	edule Status Info			
Schedule S		02/06/2025 - Baseline Revise & Resubmit	Schedule Review com	plete; Request to
Schedule R	eview Comment(s)	Schedule review comr	nents to be added he	re.

- 4. The Design Lead Contact can collaborate with the Project Manager using **Chatter** as well if needed. Refer to the <u>Chatter</u> section for more details on using Chatter.
- The Design Lead Contact can update the Edit Schedule based on the Schedule Review Comments received from the Project Manager. After making the necessary updates, they can Log Manual Update and resubmit the Schedule Update to the Project Manager. Refer to sections Logging Manual Update and Submitting Schedule Update for more details.

4.12 Documents

The **Documents** tab is a central repository for all project-related documentation.

In ProjectInfo, Documents are stored in a shared repository, in which the documents exist in a Flat Folder structure which are searchable using Document Tags/Metadata. **Notes**:

- Designers do not have access to Legacy Documents. (Legacy Documents are the project files that were previously uploaded from MassDOT's file repository)
- The documents displayed under the **Documents** are approved by the Project Manager.

4.12.1 Document Search

Users can search for documents using a basic search and Advanced Search features.

4.12.1.1 Basic Document Search

To search for a document with a Document Name:

- 1. Go to the **Project** > **Documents** tab.
- 2. Enter the Document Name in the **Search for Document** field and click the **Search** button.

Search results will display under the **Uploaded Document(s)** section.

Ho	me Proje	cts Reports	My Profile	Help Mana	ige Users			Ą	Edward Smith
ails Search Schedule	Live Schedu	ıle Edit Schedu	le Initiation &	Sc Facilit	y Info Mana	gement Rev	iew Docum	nents Comm	unication Mo
Select Area of Work	•	Document	t Search					▲ Upload	🛃 Downloa
3. Activity Group									
Select Activity Group	-	Search for De	ocument						
4. Document Tag		Q Schedu	ıle Narrative 🔶		8	Search			
Select Document Tag	•								
5. Document Category			Uploaded Doc	ument(s)		🖺 Ехр	ort as CSV	+ Select More Fie	lds to Display
Select Document Category	•	·				1			
6. Document Name			Docume V	Docume 🗸	Version \lor	Docume 🗸	Milestone \lor	Area of 🗸	Activity \lor
7. Version		1	Screenshot 2024-08-21 at 1.17.45 PM.p- ng	Schedule Narrative	1.0	Project Management	General	Contract/Proje ct Management	Project Milestones
8. Upload By									

3. The **Uploaded Document(s)** section has default columns Document Name, Document Tag, Version, Document Category, Milestone, Area of Work, and Activity Group. 4. Use the + Select More Fields to Display button to customize the columns.

	Up	bloaded Docu	ument(s)		Exp	ort as CSV	+ Select More Fie	lds to Display
		Docume \vee	Docume 🗸	Version \lor	Docume 🗸	Milestone 🔨	Area of 🗸	Activity \vee
1		Screenshot 2024-08-21 at 1.17.45 PM.p- ng	Schedule Narrative	1.0	Project Management	General	Contract/Proje ct Management	Project Milestones

A Select More Fields to Display pop-up displays.

5. Select the columns to display in the table and click the **Save** button.

Please select at most 11 (minimu which to display:	um of 1) :	search fields and arrange in the or	der in
Search Fields		Selected Search Fields	
Accepted Schedule Date		Document Name	
BDept		Document Tag	
BIN	•	Version	•
District		Document Category	
External Access		Milestone	
Facility Carried		Area of Work	
Feature Intersected	-	Activity Group	

The user has the option to export the view of the results as a CSV file. Click **Export as CSV** to generate as needed.

4.12.1.2 Advanced Search Panel

Under the **Documents** tab users have access to the **Advanced Search** panel, allowing filter and target search results.

Users can enter information in various fields to narrow their search.

Steps performed on the **Documents > Advanced Search** Panel are similar to the steps mentioned in <u>Schedule Search > Advanced Search</u> section.

Home	Projects	Reports My Profile	Help Mana	ge Users			<u> </u>	Edward S
tails Search Schedule Live S	chedule	Edit Schedule Initiation	& Sc Facilit	y Info Ma	anagement Rev	iew Docum	ients Comm	unication
ADVANCED SEARCH		Document Search					<u>↑</u> Upload	🛃 Dow
Edit Search Fields Save View As		Search for Document	using any keyword(s)		Search			
Search View Select		Uploaded D	ocument(s)		Exp	ort as CSV	+ Select More Fiel	lds to Display
		Docume	∨ Docume… ∨	Version	∨ Docume… ∨	Milestone $ \smallsetminus $	Area of $ \lor$	Activity
1. Milestone Select Milestone		Screenshot 2024-08-21 a 1.17.45 PM.p		1.0	Project Management	General	Contract/Proje ct Management	Project Milestones
2. Area of Work		ng					wanagement	
Select Area of Work 🛛 🔻		2 PINFO UAT TEST 1.pdf	Other	2.0	Submission	25%	Procurement Phase	RFQ
3. Activity Group Select Activity Group		3 PINFO UAT TEST.pdf	Other	1.0	Submission	25%	Procurement Phase	RFLOI
4. Document Tag								
Select Document Tag 🛛 🔻		Search for Document						
5. Document Category		\bigcirc Search for a Document u	using any keyword(s)		Search			
Select Document Category 🛛 🔻								
6. Document Name		Uploaded D	ocument(s)		Exp	ort as CSV -	+ Select More Fiel	lds to Display
7. Version		Docume	∨ Docume… ∨	Version	∨ Docume… ∨	Milestone $ \smallsetminus $	Area of \lor	Activity
8. Upload By		Screenshot 2024-08-21 a 1.17.45 PM.p ng		1.0	Project Management	General	Contract/Proje ct Management	Project Milestones
9. Upload Date		2 PINFO UAT TEST 1.pdf	Other	2.0	Submission	25%	Procurement Phase	RFQ
From To Reset Search		3 PINFO UAT TEST.pdf	Other	1.0	Submission	25%	Procurement Phase	RFLOI
Keset Search								

Export Documents as a Report

The user has the option to export the view of the results as a CSV file. Click **Export as CSV** button to generate as needed.

To export the documents as a report, follow the instructions below:

1. Select the checkbox against the required documents.

1. Click the **Export as CSV** button.

				Connada			
	Document using any key	word(5)		bearch			
Up	loaded Documen	t(s)			Exp	oort as CSV + Select	More Fields to Display
-	Document Name 🗸 🗸	Document Tag 🛛 🗸	Version \checkmark	Document Cate 🗸	Milestone \checkmark	Area of Work \sim	Activity Group $~~$
	605304 Schedule Narrative 05 Sep 24.PNG	Schedule Narrative	3.0	Project Management	General	Contract/Project Management	Project Milestones
•	605304 Right of Way Plans2 10 Sep 24.PNG	75% Right of Way Plans	2.0	Submission	75%	Right of Way	75% Right of Way State
•	Right of way proposed plans.PNG	Other	3.0	Submission	75%	Right of Way	75% Right of Way State
•	605304 Right of Way Plans 10 Sep 24.PNG	75% Right of Way Plans	1.0	Submission	75%	Right of Way	75% Right of Way State
	Pre-25% Design package.PNG	Pre-25% OTS Conceptual Design	1.0	Submission	Pre-25%	Design	Pre-25% Design
	Up •	■ Document Name ✓ Obs304 Schedule Narrative 05 Sep 24.PNG Obs304 Right of Way Plans2 10 Sep 24.PNG Plans2 10 Sep 24.PNG plans.PNG obs304 Right of Way Plans 10 Sep 24.PNG Pre-25% Design	for a Document using any keyword(s) Uploaded Document(s) □ Document Name ∨ Document Tag ∨ 605304 Schedule 24.PNG Schedule Narrative 24.PNG Schedule Narrative 24.PNG ✓ 605304 Right of Way Plans2 10 Sep 24.PNG 75% Right of Way Plans ✓ Right of way proposed plans.PNG Other ✓ 603304 Right of Way Plans 10 Sep 24.PNG 75% Right of Way Plans ✓ Pre-25% Design Pre-25% OTS Concentual Design	for a Document using any keyword(s) Image: Comparison of the second s	for a Document using any keyword(s) Search Uploaded Document(s) Document Name ✓ Document Tag ✓ Version ✓ Document Cate ✓ 605304 Schedule Narrative 05 Sep Schedule Narrative 24.PNG 605304 Right of Way Plans2 10 Sep 24.PNG 75% Right of Way Plans 2.0 Submission glans.PNG Other 3.0 Submission Pre-25% Design Pre-25% OTS Cancentual Darian 1.0 Submission Pre-25% Design Pre-25% Design 1.0 Submission Pre-25% Design Pre-25% OTS 1.0 Submission	for a Document using any keyword(s) Search Uploaded Document(s) Image: Comparison of the second	Image: Search Search Image: Search Search Image: Search Image: Search Image: Search Image: Search Image: Search Image: Search Image: Search Image: Search Image: Search Image: Search Image: Search Image: Search Image: Search Image: Search Image: Search Image: Search Image: Search Image: Search Image: Search Image: Search Image: Search Image: Search Image: Search Image: Search Image: Search Image: Search Image: Search Image: Search Schedule Narrative 3.0 Image: Search Image: Search Image: Search

A Select Fields to Export pop-up displays.

2. Select the fields to display in exported CSV and click the **Export** button.

					×
m	Select	Field	ls to Export		
	Please select fields to display in	n exported	I CSV:		
foi	Display Fields		Selected Display Fields		
jea	BIN	•	Document Name	^	
	Project Number		Document Tag		
æ.	Facility Carried	•	Version	•	
	Public Comment #		Document Category		
	Accepted Schedule Date		Milestone		
1	District		Area of Work		
	BDept	-	Activity Group	•	
2					
3		Cancel	Export		
	C05204 D: 1 - 414				

- 3. A CSV file will be downloaded onto your local drive.
- Note: Users can change format and alignment in the exported CSV. For example, you can set top alignment by using right-click on the selected cells, choose "Format Cells," navigate to the "Alignment" tab, and set "Vertical" to "Top" in Excel to see all the dependencies.

A	L ▼ : × √ f _x Docum	ent Name								
	А	В	с	D	E	F	G	н	1	J
1	Document Name	Document Tag	Version	Document	Milestone	Area of Wo	Activity Gro	oup		
2	605304 Schedule Narrative 05 Sep 24.PNG	Schedule Narrative	3	Project Ma	General	Contract/F	Project Mil	estones		
3	605304 Right of Way Plans2 10 Sep 24.PNG	75% Right of Way Plans	2	Submissio	75%	Right of W	75% Right	of Way Sta	te	
4	Right of way proposed plans.PNG	Other	3	Submissio	75%	Right of W	75% Right	of Way Sta	te	
5	605304 Right of Way Plans 10 Sep 24. PNG	75% Right of Way Plans	1	Submissio	75%	Right of W	75% Right	of Way Sta	te	
6	Pre-25% Design package.PNG	Pre-25% OTS Conceptual	1	Submissio	Pre-25%	Design	Pre-25% D	esign		
7	75% Design Package.PNG	75% Design Package	2	Submissio	75%	Design	75% Desig	n Package		
8	Supporting Document.PNG	25% Design Package	2	Approval	25%	Design	25% Desig	n Package		
9	25% Design package.PNG	25% Design Package	2	Approval	25%	Design	25% Desig	n Package		
10	Impact Analysis.PNG	Historic/Archaeology - Fe	1	Review Co	25%	Environme	Historic / A	rcheology	(Section 1	06) Review
11	State Register Review.PNG	Historic/Archaeology - Fe	1	Review Co	25%	Environme	Historic / A	rcheology	(Section 1	06) Review
12	Public Notice.PNG	Pre-25% OTS Conceptual	1	Submissio	25%	Design	Pre-25% D	esign		
13	Project Status Sheet Report (5).pdf	75% Design Package	1	Submissio	. 75%	Design	75% Desig	n Package		
14	External.png	Schedule Narrative	2	Project Ma	General	Contract/F	Project Mil	estones		
15	Internal.png	Schedule Narrative	2	Project Ma	General	Contract/F	Project Mil	estones		
16	image001.png	Schedule Narrative	2	Project Ma	General	Contract/F	Project Mil	estones		
17	Screenshot 2024-08-21 at 1.17.45â€⁻PM.png	Schedule Narrative	1	Project Ma	General	Contract/F	Project Mil	estones		
18	PINFO UAT TEST 1.pdf	Other	2	Submissio	25%	Procurem	RFQ			
19	PINFO UAT TEST.pdf	Other	1	Submissio	25%	Procurem	RFLOI			
20	sample test MSExcel.xlsx	DPH - Response to Public	1	Project Ma	25%	Design	Conduct 2	5% Design	Public Hea	iring
21	sample test MSWord document.docx	DPH - Public Comments	1	Project Ma	25%	Design	Conduct 2	5% Design	Public Hea	iring
22	123456 Markup Summary 6-12-2024.pdf	25% Design Package	1	Review Co	25%	Design	25% Desig	n Package		

4.12.2 Uploading Documents

Users can upload documents for various Activity groups and tag users via chatter to notify them.

Note: For any errors in document tag selection or upload of document(s), please consult the Project Manager.

To upload a Pre-25% Design Package, follow the instructions below:

- 1. Go to the **Project** > **Documents**.
- 2. To upload the document, click the **Upload** button.

PROJECTINFO	Home	Projects	Reports	My Profile	Help	Manage Us	ers			Ļ	Edward Smith 👻
Assi	gned Section: N	lajor Projects			STIP Yea	ar(s):			STIP Cost:		
PIF	PRC	Pr	e-25%	25% Design	75%	Design	100% Design	Final Design	Advertising		Construction
8/21/2024		8/2	1/2024						1/1/2023 (Scheduled)		
Details Search Sch	nedule Live	Schedule	Edit Schedu	le Initiation	& Sc	Facility Info	Managemei	nt Review	Documents Co	mmuni	cation More
ADVANCE	D SEARCH		Documen	t Search					1 Up	load	🛃 Download
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3. Under the Activity Group, click the **Select an Activity Group** down arrow, select the **Pre-25% Design** option, and click the **Next** button.

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- 4. Under **Document Validation Checklist** select the required answers and click the **Next** button.
- 5. **Note**: You can click the **Back** button to go to the previous page.

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	ets only.
* 6) AutoCAD files to be uploaded as one zip file.	
Complete NA	
* 7) Designer shall submit Response to Comments (RTC) in both RTC Markup Summary and RTC Submission file format.	
Complete NA	
* 8) Required Draft Environmental Permits are submitted with the 75% Design Package.	
Complete NA	
9) Designer has verified the Funding Categories with the Project Manager to be used for the Cost Estimate.	
Complete 💿 NA	

6. After clicking next the user advances to the **Upload & Add Details** chevron. Locate and click the **Upload** button.

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An **Upload Document(s)** pop-up displays.

 Upload Document(s) window opens up with a list of Applicable Document(s) for Selected Activity Group. Click on the Upload Files button or use Or drop files.
 Note: Users can upload multiple files.

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8. A File Explorer pop-up displays. Select the required document(s) and click the **Open** button.

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9. Once the document(s) are uploaded, click the **Done** button.

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10. After uploading the required files, click **Next**.

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11. An **Uploaded Documents** section displays with the uploaded documents. For each Document, update the required details (Document Tag, Milestone and Document Category).

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ocument Name	Document Tag		Milestone		Document Category		Allow External Access
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- 12. Click the down arrow in the **Document Tag** column and select the required option (For example, Pre-25% OTS Conceptual Design Package) from the dropdown.
 - (1) If your Document Tag is not available, Select "Other" as the Document Tag
 - (a) A field will be displayed **Other Document**
 - (b) Enter the Name of the document in the **Other Document** field.

Document Name	Document Tag	Milestone	Document Category	Allow External Access (
Project Status Sheet Report (5).pdf	Other	Select an Option	▼ Select an Option	▼
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Project Status Sheet Report (4).pdf	Select an Option	✓ Select an Option	▼ Select an Option	*

13. Click the down arrow in the **Milestone** column and select the required option (For example, Pre-25%) from the dropdown.

Note: The Milestone column will be auto populated based on the selected Activity Group but can still be edited manually.

- 14. Click the down arrow in the **Document Category** column and select the required option from the dropdown.
- 15. After performing the same action for each uploaded document, click the **Save** button.

Note: Please contact the System Administrator if a	any updates are needed to the files uploaded below.			
Iploaded Documents				1 Upload
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3		Impact Analysis.PNG	Historic/Archaeology - Federal Section 106 and State - Impact Analysis	1.0	Review Comments	25%		Environmental	Historic / Archeology (Section 106) Review
4		State Register Review.PNG	Historic/Archaeology - Federal Section 106 and State Register Review	1.0	Review Comments	25%		Environmental	Historic / Archeology (Section 106) Review

The Uploaded documents will be displayed under the Documents tab.

A Bell Notification is sent out to the Project Manager once the documents are successfully uploaded.

4.12.3 Previewing Documents

Users can see a preview of the documents from the Documents Tab by clicking on the Document Name Hyperlink.

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2		005_607231_H Sta and C	75% Design Package	Response to Comments	75%	Design	75% Design Package	6/4/2025	Greg Frazier

The Document Name hyperlink when clicked opens the preview of the document in a new tab.

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4.12.4 Downloading Documents

Users can download the documents from the Documents tab.

To view and download the 25% Design Package document, follow the instructions below:

1. Go to the **Project > Documents.**

Home Projects	Reports My Profile Help Manage Users	Edward Smith 🔻
(nprotes)		
Details Search Schedule Live Schedule	Edit Schedule Initiation & Sc Facility Info Management Review Documents Comm	unication More
ADVANCED SEARCH	Document Search 🏦 Upload	🕁 Download
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 On the Advanced Search left panel, select the Activity Group as 25% Design Package and click the Search button.

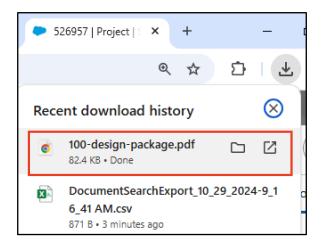
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7. Version	3		External.png	Schedule Narrative	2.0		Project Management	General		Contract/Project Management	Project Milestones
	4		internal.png	Schedule Narrative	2.0		Project Management	General		Contract/Project Management	Project Milestones
8. Upload By	5		image001.png	Schedule Narrative	2.0		Project Management	General		Contract/Project Management	Project Milestones
9. Upload Date	6		Screenshot 2024- 08-21 at 1.17.45 PM.png	Schedule Narrative	1.0		Project Management	General		Contract/Project Management	Project Milestones
From 🗃 To 🛱	7		PINFO UAT TEST 1.pdf	Other	2.0		Submission	25%		Procurement Phase	RFQ
Reset Search	8		PINFO UAT TEST.pdf	Other	1.0		Submission	2596		Procurement Phase	RFLOI

The list of documents within the selected activity group will be displayed under the **Uploaded Document(s)** section.

3. Select the checkbox(s) next to the Document Name(s) and click the **Download** button.

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The Users can see the downloads on their local drive.



5 Support

The Support feature in the ProjectInfo application is designed to assist users with any challenges or questions they may encounter while using the system.

Users can send an email to projectinfosupport@dot.state.ma.us. This email is prominently displayed on the footer of the Portal at all times.

Upon sending the e-mail, a MassDOT Support group is alerted and will promptly respond to the User to resolve issues and continue work without significant delays.

For example, when uploading a document in the **Documents** tab, a note will be displayed, providing a support email for further updates. By clicking on this email link, users can conveniently request updates or seek additional assistance.







Request MassDOT Portal Access

Login

Please log in to the MassDOT Project Information Portal **O**

Lenter Username (Your Email is the Username)

Enter Password

Log in

Forgot your password?

Contact us

For any questions or additional information, please contact us at projectinfosupport@dot.state.ma.us

6 Appendix

6.1 ProjectInfo Definitions

This section provides definitions for frequently used terms on the ProjectInfo platform.

TERM	DEFINITION
Арр	A shortened form of the term Application, an App is a collection of components, such as tabs, reports, and dashboards, that address a specific business need. Apps are assigned to Users.
Assigned Projects	A Project that is assigned to a specific ProjectInfo staff user for review or action is considered as an Assigned Project. They can be located on the <i>Assigned Projects</i> list view.
Unassigned Projects	Projects which are yet to be assigned to a Project Manager.
Chatter	A communication tool enabling a Project Team to collaborate.
Chevron	The chevron on the Project page functions as a progress bar, illustrating all the stages of a project. The in-progress stage is colored Blue, and the current stage is highlighted green. Stages that are yet to start are in grey.
Contact	A Contact in ProjectInfo represents a Design Firm Admins and External Designer who have registered to conduct business with MassDOT. This is a representation of External Users that have been approved for ProjectInfo.
Document(s)	A term used for Project Correspondence, Design Submissions, Files, Plans, Reports, or any Design Deliverables.
Home Page	The landing page which displays a list of work items, if any, assigned to the user. May display other tabs such as a Dashboard depending on the User Role.
Portal	The MassDOT Project <u>Information Portal</u> offers restricted access as required for contracted staff to access and collaborate on features of a Project they are assigned to.

TERM	DEFINITION
Project	A MassDOT Project is a transportation improvement initiative. Users can navigate to Project to find detailed information organized by relevant groupings.
Report	A group of records that meet specific common criteria displayed in an organized series of rows and columns. Report data can be filtered, grouped, and displayed graphically as a chart.
PINFO System Administrator	Occasionally referred to as the Sys Admin, the ProjectInfo System Administrator is the individual who manages User credentials, assigns Users, and manages the back-end features and functions of the ProjectInfo system.
Tab/Sub-Tab	Organizes and segregates information within a page
Work Items	Activities/Milestones/Tasks displayed on the Home Page for easy access
Schedule	A single place to see all Project-related Information. Below terms are used to define various Project-related requirements and progress.

6.2 Schedule Definitions

This section provides definitions for frequently used terms on the Schedule.

TERM	DEFINITION
Activity Record Page	Tasks and Events record screen where essential info related to an Activity can be viewed.
Baseline	A snapshot of a Project's original, approved schedule before it starts. It can be used to compare the current schedule to the original plan to assess the performance of a Project over time.
Critical Path	The Critical Path is the longest logical path through the network of activities

Demender	
Dependency	A dependency is a link between two activities or between an activity and a milestone.
	There are 4 types of dependencies, <i>Finish to start</i> (FS), <i>Finish to finish</i> (FF), <i>Start to start</i> (SS), and <i>Start to finish</i> (SF).
	A dependency can be created within a single project Plan Gantt Board.
Duration	The Duration is the amount of time to complete a work item from start to finish.
Lag	A Lag is the delay of a successor work item to represent the time that must pass before a second activity can begin. Lag may be found in activities with all relationship types: <i>finish-to-start, start-to-start, finish-</i> <i>to-finish,</i> and <i>start-to-finish</i> .
Lead	The Lead is the acceleration of a successor activity (see also Lag, above). In other words, the second activity can begin (and be conducted in parallel) with the first activity. Lead is only found in activities with finish-to-start relationships i.e., A must finish before B can start.
Milestone	Significant point in a Project schedule marking a key achievement or deliverable.
Activity Owner	Individual responsible for any activity on the schedule.
Percent Complete or % Done	Indicates the amount of work completed on a work item as a percentage of the total amount of work required to complete that work item.
Schedule Activity	The sequence of activities required to complete a project. Project deliverables that are organized on a Schedule as Activity Groups, Activities and Milestones that represent the work that must be completed to advertise a project.
Schedule (Gantt Chart)	Gantt charts are commonly used in Project planning and scheduling to provide a clear, visual representation of the Project's timeline, helping managers track progress,

	identify delays, and allocate resources
	efficiently.
Quick Actions	This is accessed through the schedule vertical ellipsis. A menu of frequently used actions.
Resource Management	The Resource Management views allow Resources to be effectively managed, so load balancing of Resources with Work Items is accommodated. Resource Management consists of the Resource Scheduling View and the Resource Utilization View, which both can be viewed at the same time through Split Screen Mode.
Resource Scheduling View	The Resource Scheduling View lists the Resources and which Work Items each resource has been assigned, along with the duration of each work item, represented by horizontal bars. Individual Work Items can be dragged and dropped between Resources to reassign Work from one Resource to another. The Resource Scheduling View can show Resources by Department Role Hierarchy or by Project and can be viewed in Split Screen mode with the Resource Utilization View to enable effective resource management.
Risk Register	The Risk Register, or Risk Log, is a tool used to chronicle increased risk situations and risk responses as they arise.
Sticker	A Sticker is a visual reference that the System automatically assigns to Work Items to draw attention to the item. MassDOT may assign stickers to Activities.

6.3 Table of Stickers

These stickers are used as a visual reference that can be added to Boards and Cards to draw attention to the item.

Sticker Icon	Sticker Label/Hover text
PRE 25%	Pre 25%
25%	25% Design
75%	75% Design
100%	100% Design
СР	Critical Path
R	Activity Risk Added
С	Custom
AU	Automatic Update
N/A	Not Applicable
Μ	Major Milestone
MU	Manual Update
PS&E	PS&E
	Reporting