



MassDOT Project Information Portal

User Guide

V 1.3

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Version History

V1.3:

Updates can be found in the following sections:

[ROW and Environmental Tabs](#)

[Assigning Permit Types to WPA Activity Group](#)

[Assigning Permit Types to Environmental Activity Group](#)

[Adding Bridge Details](#)

[Submitting Baseline Schedule without Logging](#)

V1.2:

Updates can be found in the following sections:

[Viewing Schedule Comments](#)

[Search Schedule](#) – Users can filter Applicable Activities via an **Only Show**

Applicable Activities toggle

Support – Help Tab for Users

09/2025 V1.1:

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 can work directly on Live Schedule after getting the access
- Project Managers can 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
V1.2	01/2026	Up to Release 1.2	Abhikant Sharma
V1.3	02/2026	Up to Release 1.3	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
<p>External Design Lead Contact</p>	<ul style="list-style-type: none"> ● Reviewing My Work & Notifications <ul style="list-style-type: none"> ○ 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 <ul style="list-style-type: none"> ○ Updating Completed Activities ○ Marking Activities/Activity Groups as Not Applicable ○ Adjusting Dependencies & Durations ● Proposing updates on the Edit Schedule - <ul style="list-style-type: none"> ○ Marking Activity Groups/ Sub-Activities as Not Applicable or Applicable again ○ Adding Activity Groups ○ Adding Activities/Milestones ○ Updating Activity Durations ○ Editing Dependencies (Predecessor/Successor) ○ Adding a Resubmission ○ Reviewing Total Slack and Critical Path ● Editing Live Schedule - <ul style="list-style-type: none"> ○ 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 Narrative documents ● Viewing Schedule History ● Uploading documents ● Searching/Downloading documents ● Exporting Schedule Search as a CSV ● Communicating via Chatter
<p>Design Firm Admin (DFA)</p>	<ul style="list-style-type: none"> ● Managing External Design Lead Contact's Access <ul style="list-style-type: none"> ○ Accept ○ Deny ○ Deactivate

3. Getting Started with MassDOT Project Information Portal

3.1. Requesting Access

Note: **External Design Lead Contacts** should refer to the [External Design Lead Contact\(s\)](#) Section.

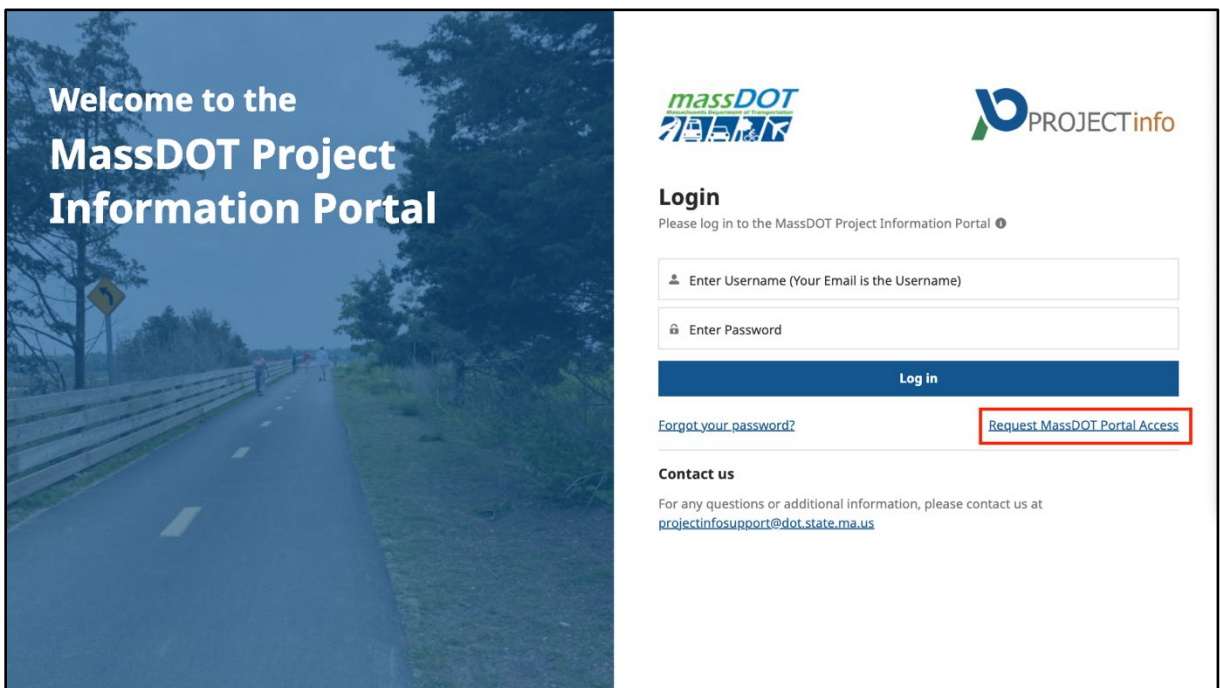
For all other users:

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:

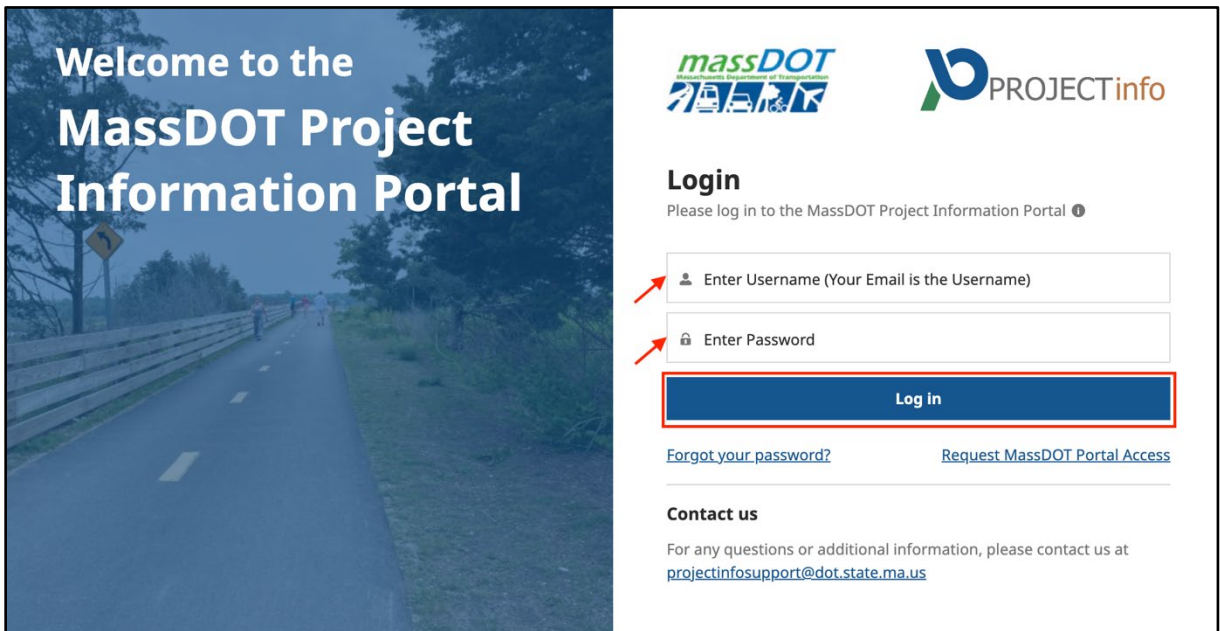
- To cancel the request, the users can click the **X** icon or **Cancel** button.
- In case of any questions or more information, users can contact the support team via projectinfosupport@dot.state.ma.us

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 Information Portal

massDOT
Massachusetts Department of Transportation

PROJECTinfo

Login
Please log in to the MassDOT Project Information Portal ⓘ

Enter Username (Your Email is the Username)

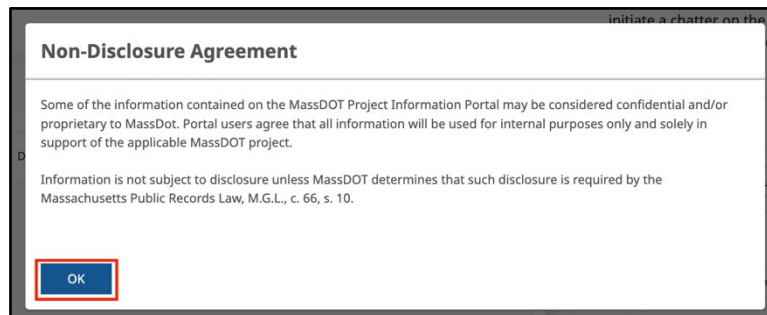
Enter Password

Log in

[Forgot your password?](#) [Request MassDOT Portal Access](#)

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

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



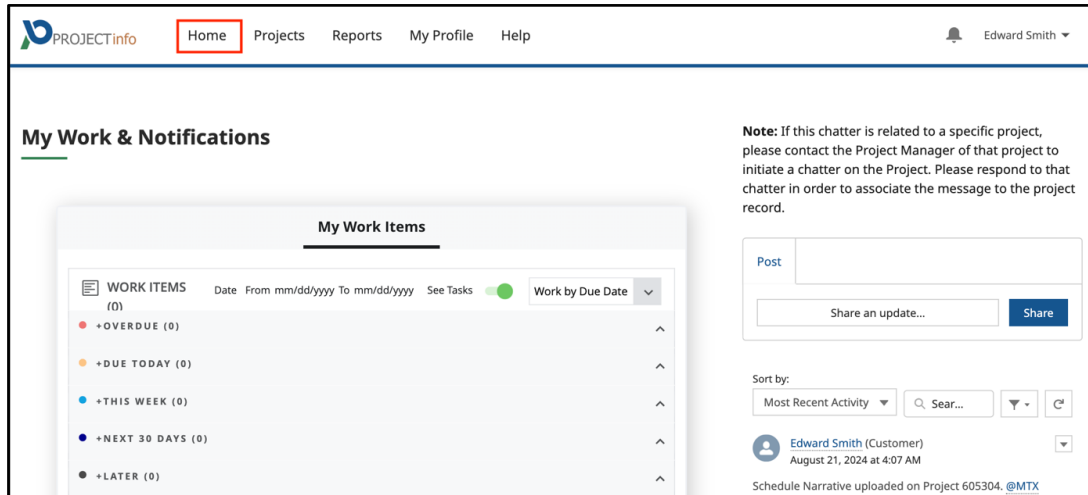
Non-Disclosure Agreement

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.

OK

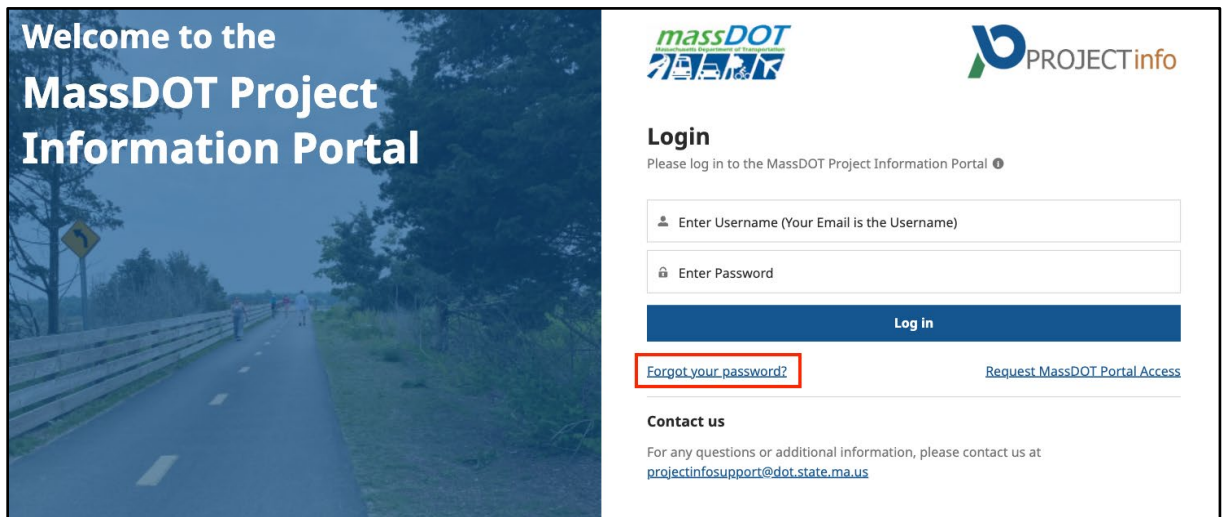
- The user will be directed to the **Home** page



3.3 Forgotten Password

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

- Go to the **MassDOT Project Information Portal** [login](#) page
- Click **Forgot your Password?**



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

Forgot Your Password

To reset your password, enter your username.

Username

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

Good

* Confirm New Password

Match

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 [Design Firm Admin Reviewing the Request](#) for more details.
 - b. DFA can also Deactivate users from this location. Refer to [Design Firm Admin Deactivating the User](#) for more details.

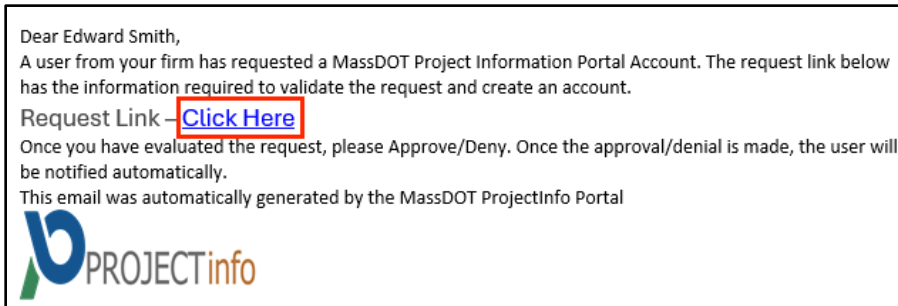
Note: A Design Firm Admin can perform all roles that an External Design Lead Contact can.

4.1.1 Design Firm Admin Reviewing the Request

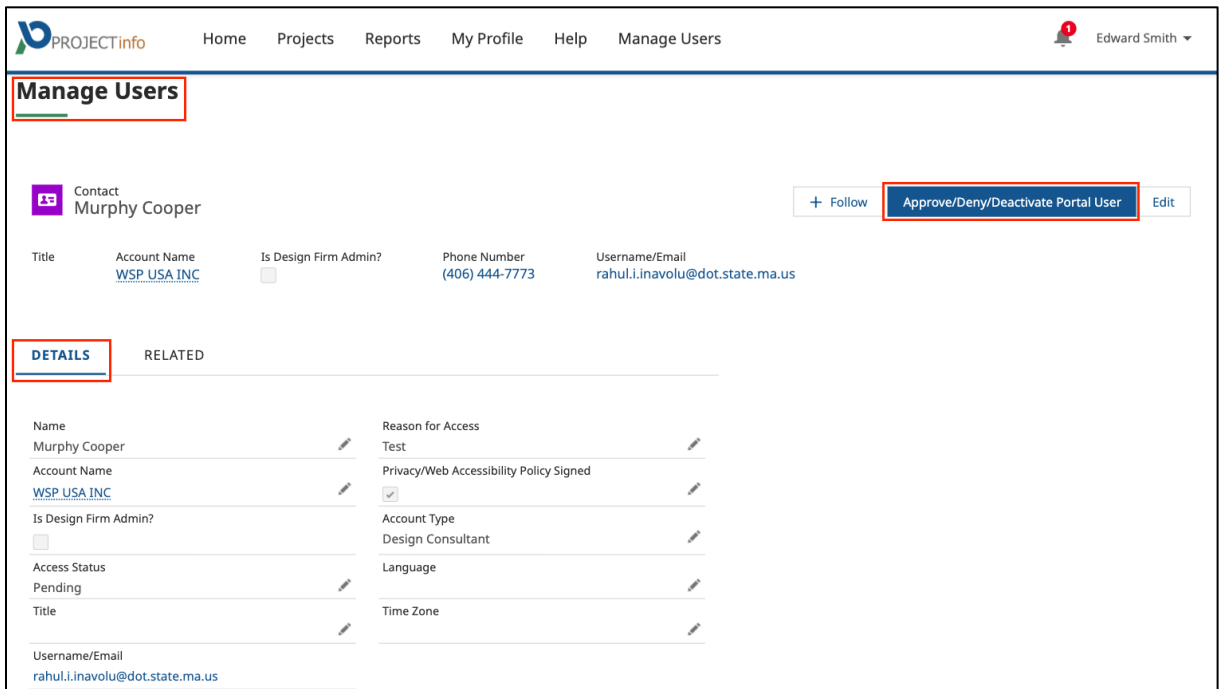
The **Design Firm Admin (DFA)** will receive an **email notification** containing a link to review the **access requests** for users in their **Design Firm**. This is to ensure that only authorized personnel from the Design Firm can access **Project Information** and manage tasks on the MassDOT Project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

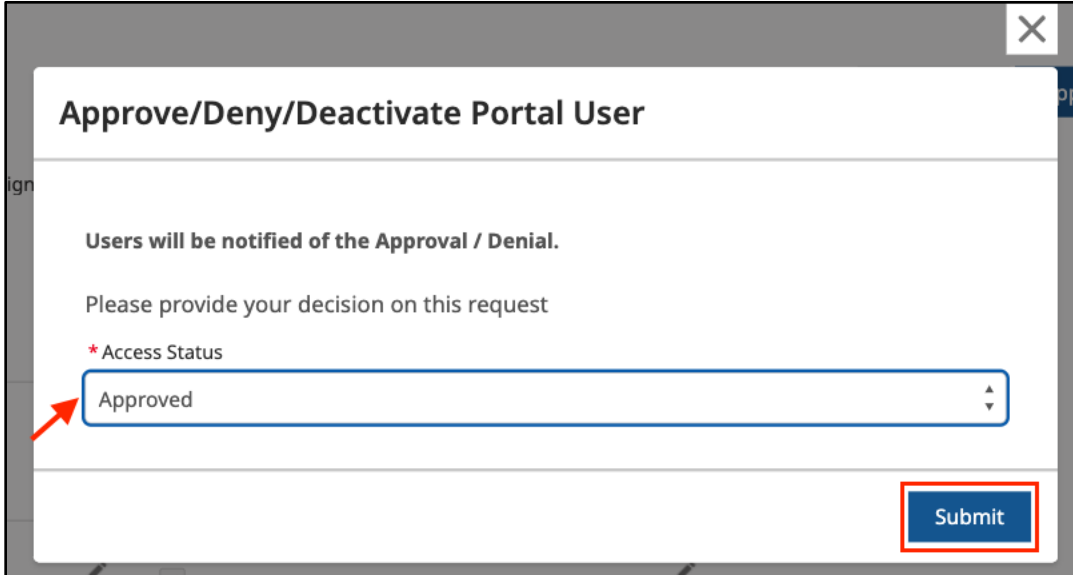


2. Users will be redirected to the MassDOT ProjectInfo Portal Login page. For more details on logging in, follow the steps outlined in the [Logging In](#) section.
3. Once logged in, Review the **Contact** details e.g., **Name, Email, Reason for Access** etc.
4. Click the **Approve/Deny/Deactivate Portal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

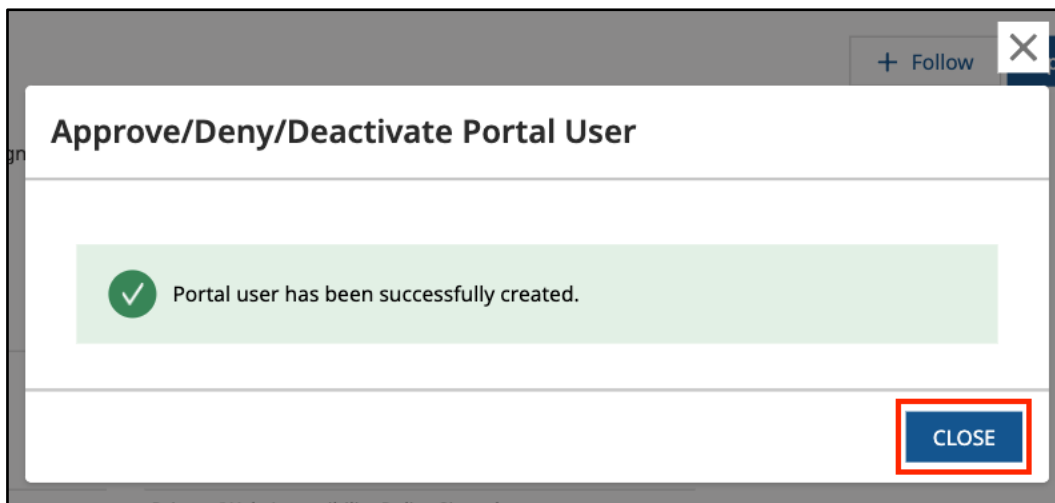


5. An **Approve/Deny/Deactivate Portal User** pop-up displays.

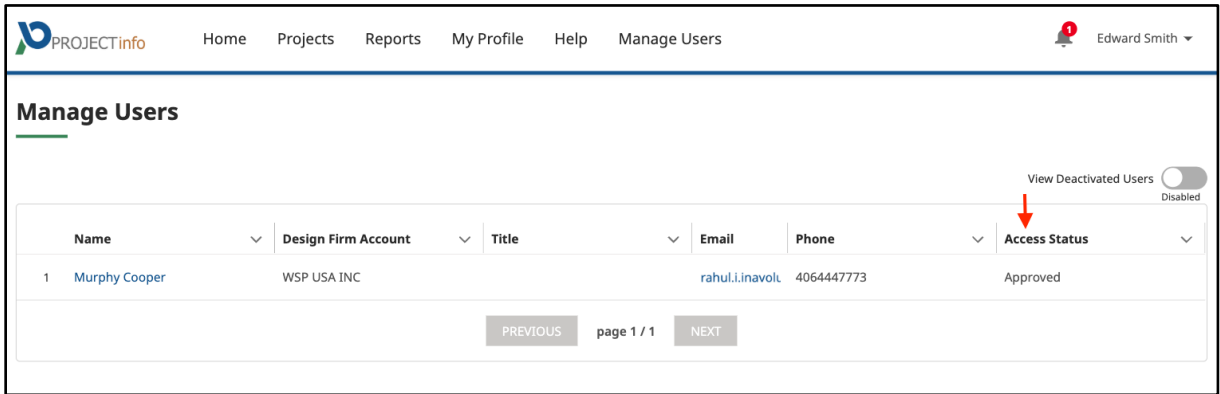
6. If the details are valid, select "**Approved**" from the dropdown list and click the **Submit** button. Else, if the details are invalid, select "**Decline**" and click **Submit**.



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.

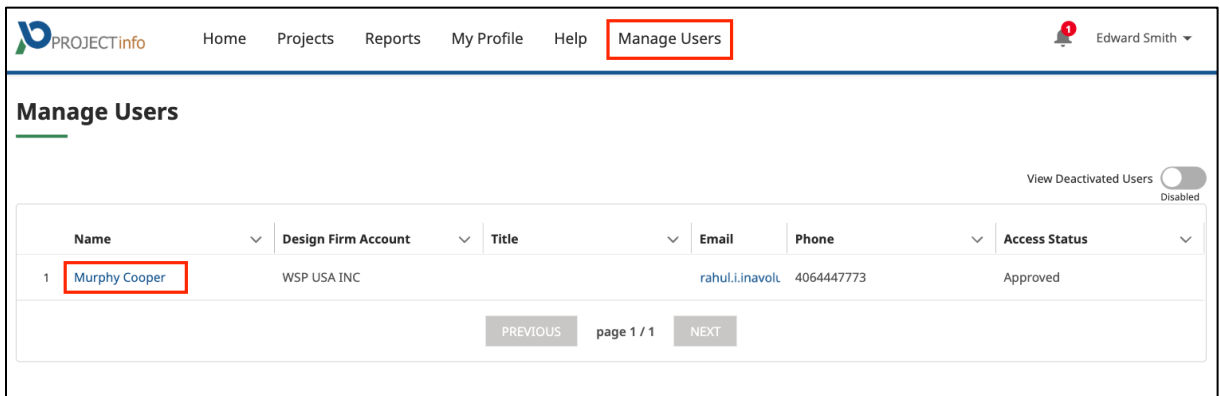


4.1.2 Design Firm Admin Deactivating the User

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



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

PROJECTinfo Home Projects Reports My Profile Help Manage Users Edward Smith

Manage Users

Contact
Murphy Cooper

+ Follow **Approve/Deny/Deactivate Portal User** Edit

Title Account Name Is Design Firm Admin? Phone Number Username/Email
WSP USA INC (406) 444-7773 rahul.i.inavolu@dot.state.ma.us

DETAILS RELATED

Name	Murphy Cooper	Reason for Access	Test
Account Name	WSP USA INC	Privacy/Web Accessibility Policy Signed	<input checked="" type="checkbox"/>
Is Design Firm Admin?	<input type="checkbox"/>	Account Type	Design Consultant
Access Status	Pending	Language	
Title		Time Zone	
Username/Email	rahul.i.inavolu@dot.state.ma.us		

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

Approve/Deny/Deactivate Portal User

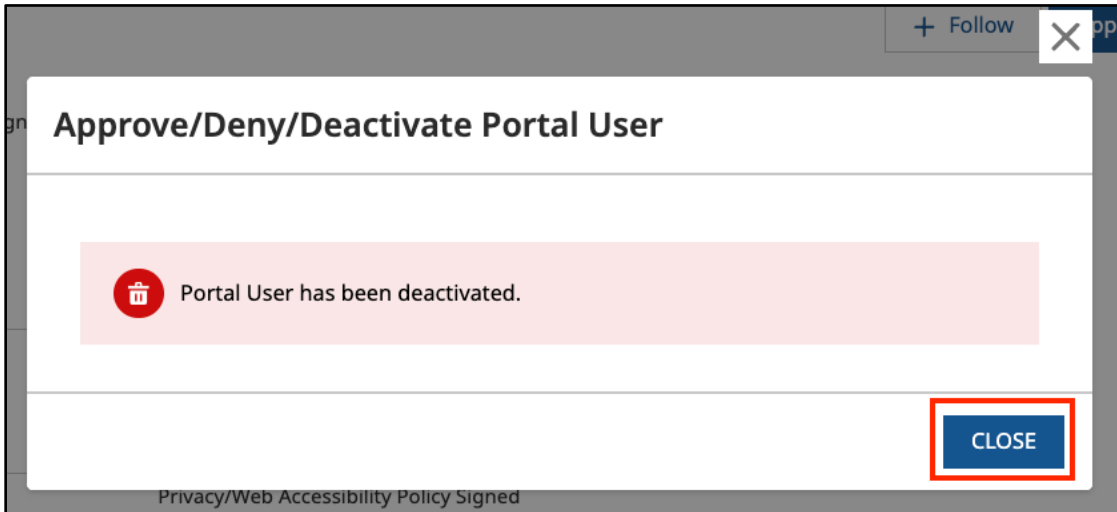
Please provide your decision on this request

* Access Status

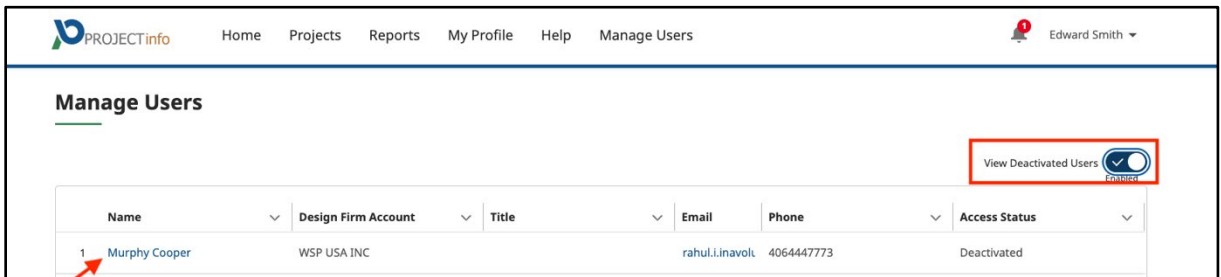
Deactivate

Submit

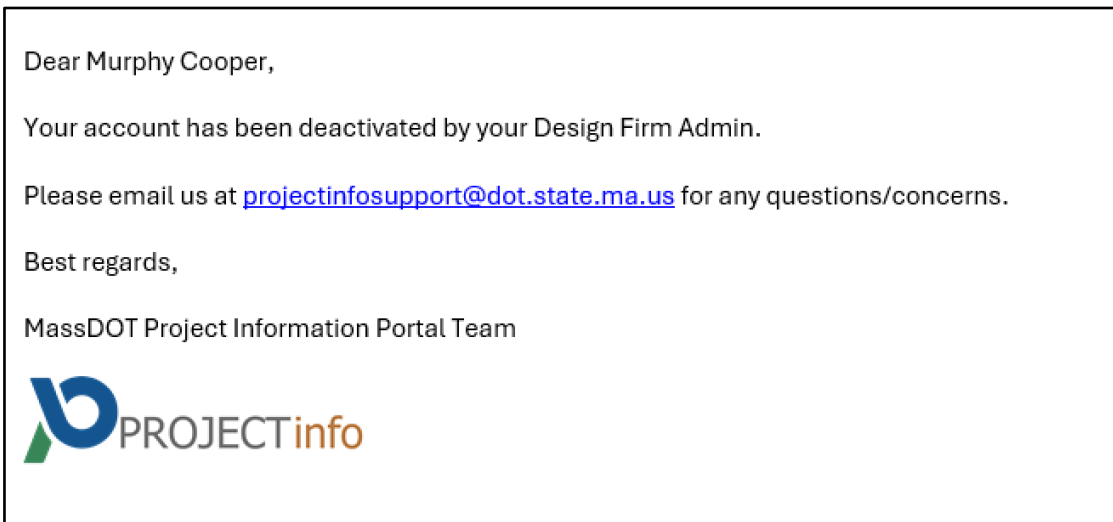
8. A message '**Portal User has been deactivated**' displays.
9. Click the **Close** button.



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



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 mark and preparing/uploading Design Package Submissions.

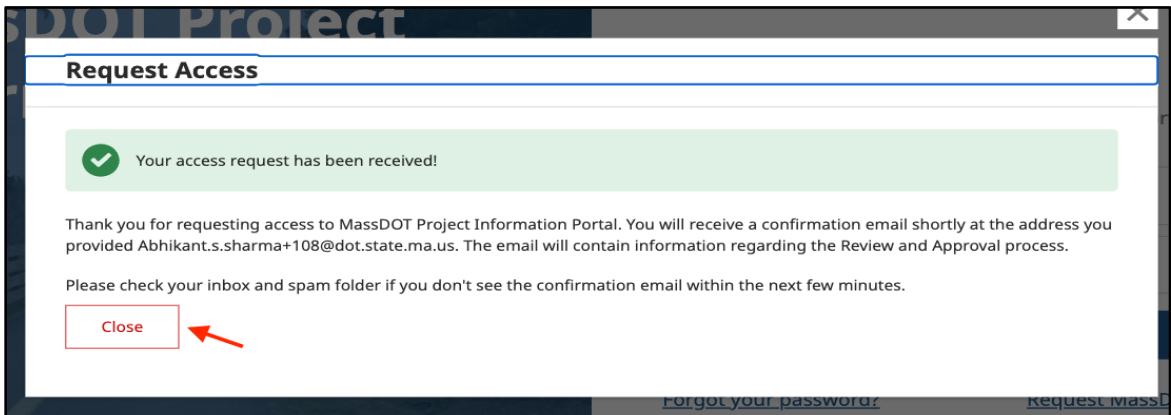
The **External Design Lead Contact** will navigate to the Portal Login Page via the Highway Website.

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

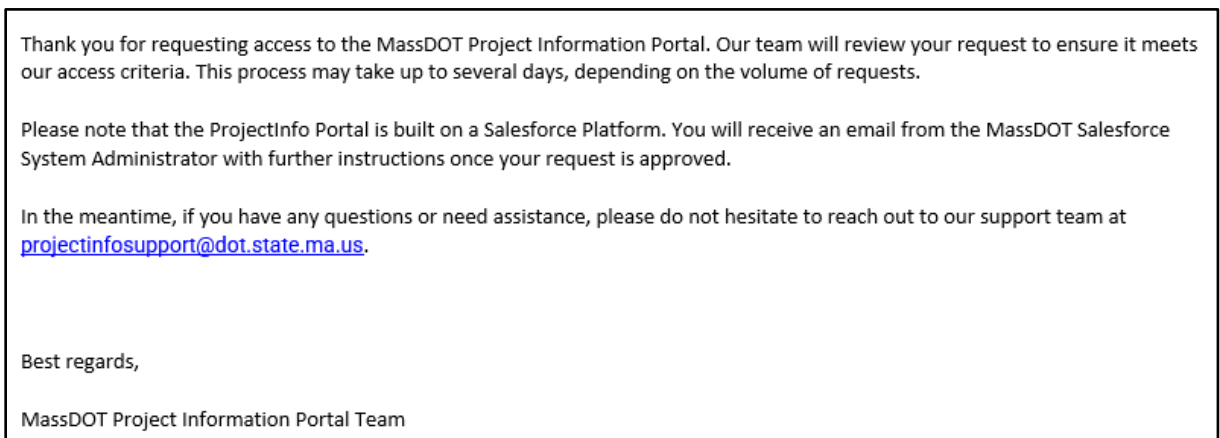
1. Click on the **Request MassDOT Portal Access** link
2. Manually Enter the required fields. **(Do not use autofill)**
3. Click on **Account Type** dropdown and select '**Design Consultant**'
4. A **Design Firm** field displays. Type in the name of your Design Firm, your Design Firm will appear in the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

The screenshot shows a web form titled "Request Access" with the subtitle "Enter information below to gain access to the MassDOT Project Information Portal." The form contains several required fields, each marked with a red asterisk. The fields are: First Name (Ahikant), Last Name (Sharma), Account Type (Design Consultant), Design Firm (Ready), Email (Abhikant.s.sharma@dot.state.ma.us), and Phone Number ((405) 665-4557). There is also a text area for "Reason For Access" containing the text "Please provide me with access". Below the form, there are links for "Mass.gov Privacy Policy" and "Web Accessibility Statement", and a checkbox for "I have read and accept the Mass.gov Privacy Policy and Web Accessibility Statement". At the bottom, there is a "Contact us" section with the email address "projectinfosupport@dot.state.ma.us". The form has a "Cancel" button on the bottom left and a "SUBMIT" button on the bottom right. Red arrows point to the "Request Access" title, the asterisk legend, the First Name field, the Last Name field, the Account Type dropdown, the Design Firm field, the Email field, the Phone Number field, the Reason For Access text area, the privacy policy links, the checkbox, the "Cancel" button, and the "SUBMIT" button.

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.



- 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:

- 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



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.
5. Once the password is successfully set, the user will be automatically logged into the **MassDOT Project Information Portal**.

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

..... Good

* Confirm New Password

..... Match

Change Password

Password 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:

The screenshot shows the PROJECTinfo portal interface. The navigation bar includes 'Home' (highlighted with a red box), 'Projects', 'Reports', 'My Profile', and 'Help'. The user's name 'Edward Smith' is visible in the top right. The main content area is titled 'My Work & Notifications'. On the left, there is a 'My Work Items' section with a table of work items. The table has columns for 'WORK ITEMS (0)', 'Date From mm/dd/yyyy To mm/dd/yyyy', 'See Tasks' (with a green toggle), and 'Work by Due Date' (with a dropdown arrow). Below the table are five categories: '+OVERDUE (0)', '+DUE TODAY (0)', '+THIS WEEK (0)', '+NEXT 30 DAYS (0)', and '+LATER (0)'. On the right, there is a 'Note' about chatters, a 'Post' input field, a 'Share an update...' button, and a 'Share' button. Below that is a 'Sort by:' dropdown set to 'Most Recent Activity', a search bar, and a user profile for 'Edward Smith (Customer)' with the date 'August 21, 2024 at 4:07 AM' and a notification icon. At the bottom right, it says 'Schedule Narrative uploaded on Project 605304. @MTX'.

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

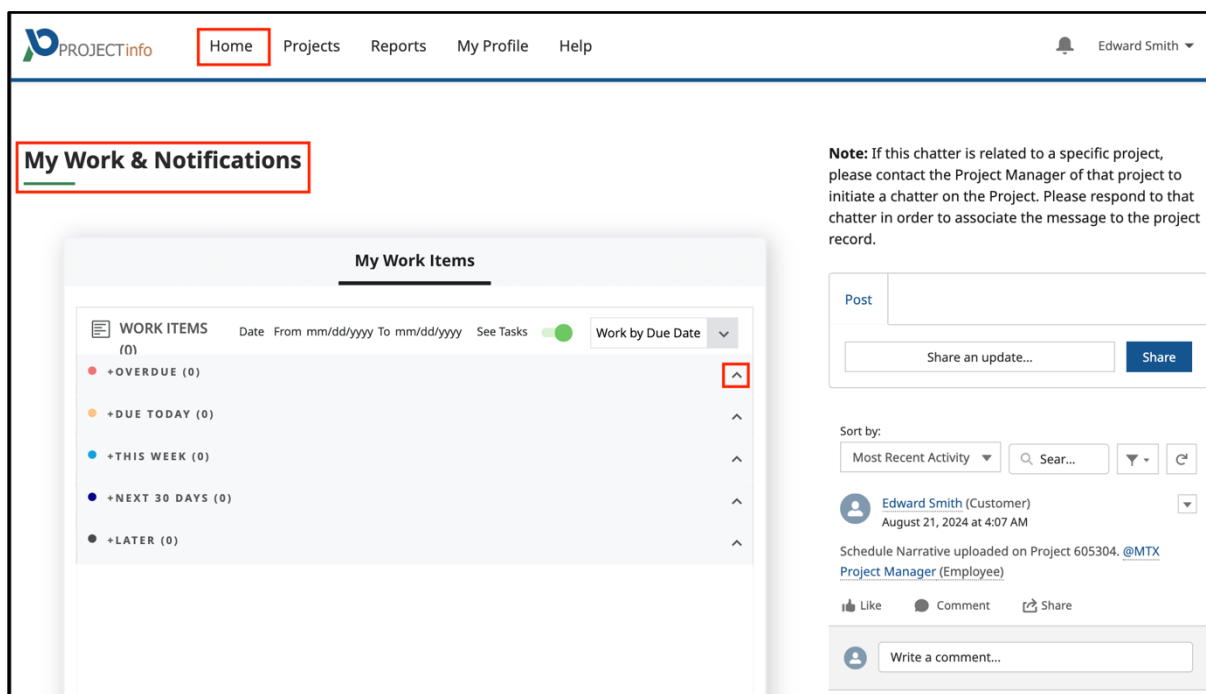
The screenshot shows the PROJECTinfo portal interface for a Design Firm Admin. The navigation bar includes 'Home' (highlighted with a red box), 'Projects', 'Reports', 'My Profile', 'Help', and 'Manage Users'. The user's name 'Edward Smith' is visible in the top right. The main content area is titled 'My Work & Notifications'. On the left, there is a 'My Work Items' section with a table of work items. The table has columns for 'WORK ITEMS (0)', 'Date From mm/dd/yyyy To mm/dd/yyyy', 'See Tasks' (with a grey toggle), and 'Work by Due Date' (with a dropdown arrow). Below the table are five categories: '+OVERDUE (0)', '+DUE TODAY (0)', '+THIS WEEK (0)', '+NEXT 30 DAYS (0)', and '+LATER (0)'. On the right, there is a 'Note' about chatters, a 'Post' input field, a 'Share an update...' button, and a 'Share' button. Below that is a 'Sort by:' dropdown set to 'Most Recent Activity', a search bar, and a user profile for 'Edward Smith (Customer)' with the date 'August 21, 2024 at 4:07 AM' and a notification icon. At the bottom right, it says 'Schedule Narrative uploaded on Project 605304. @MTX'. A blue callout bubble points to the 'Manage Users' tab in the navigation bar, containing the text: 'Only Design Firm Admins can access the "Manage Users" tab on the MassDOT Portal'.

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**.

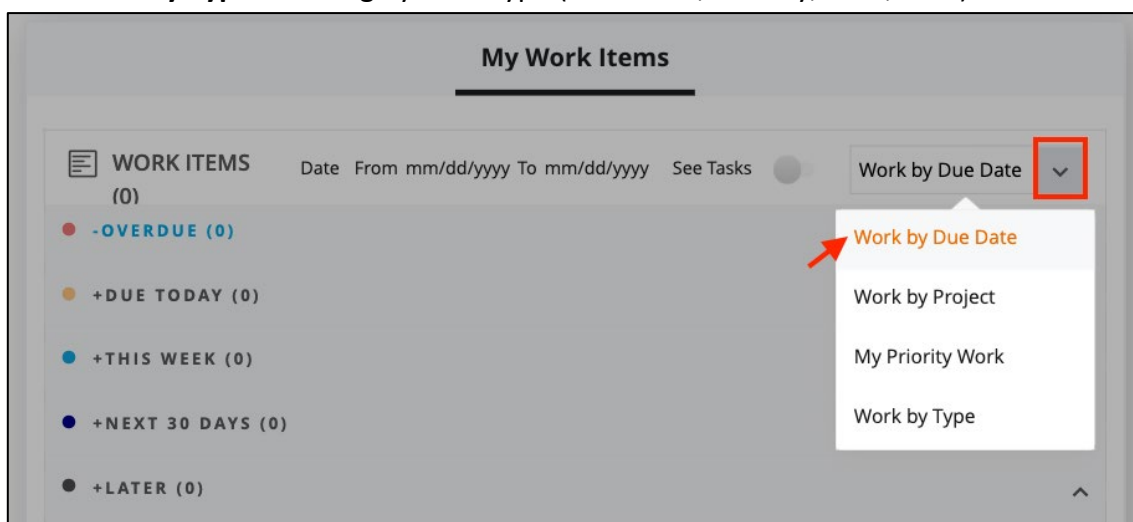
Note: Initially, no items are displayed in the **My Work Items** section. The My Work Items section serves as a starting checkpoint for the Users.



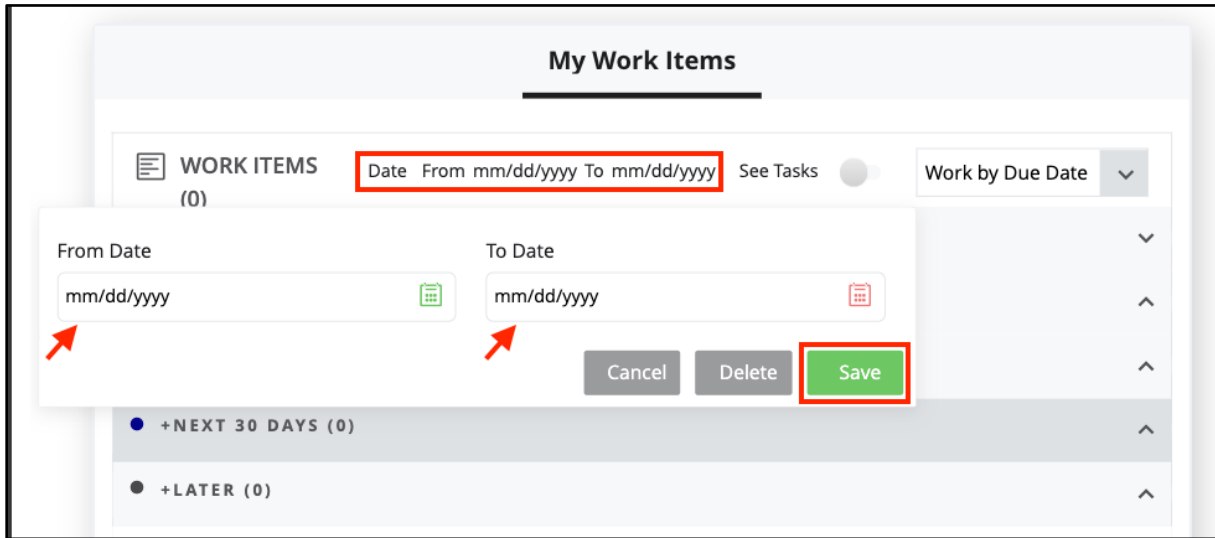
Users can customize **My Work Items** view by selecting the required type from the **Work by** drop-down list.

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

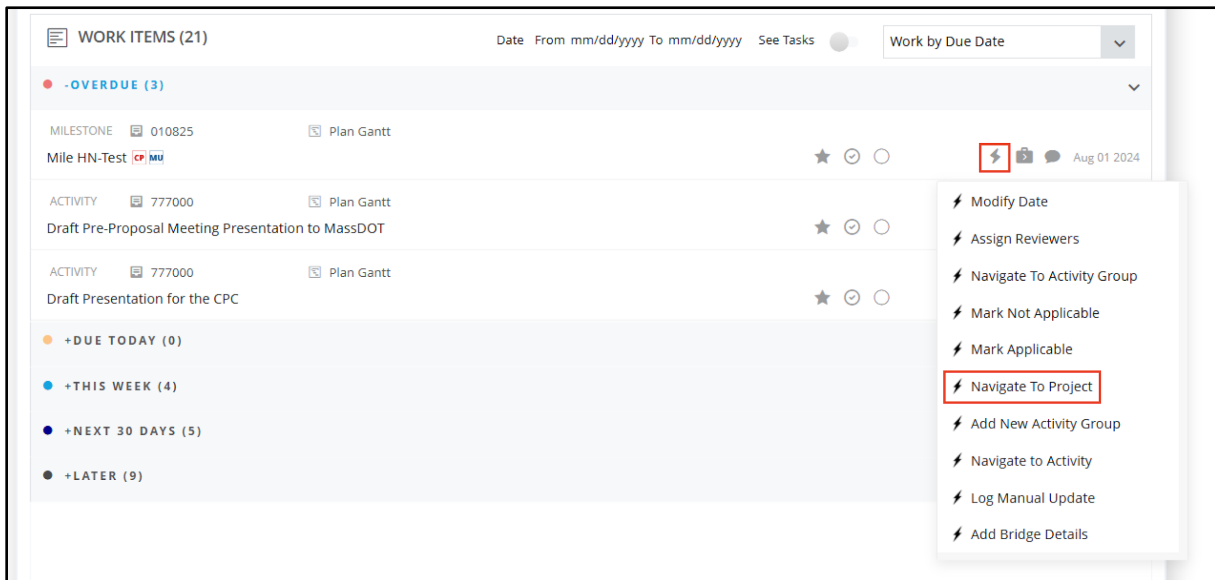
- **Work by Due Date:** Filtering Items based on period (as shown in this screenshot). Recommended Filter
- **Work by Project:** Filtering items associated with Projects that are assigned to a user
- **My Priority Work:** Filtering according to level of importance (Critical/High, Medium/Normal, Low,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



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



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.



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.

The image shows two screenshots of a notification system. The top screenshot shows a notification list with filters for due dates and a detailed view of a notification about a schedule narrative upload. The bottom screenshot shows the same notification list sorted by creation date, with a table of notification items and a detailed view of a notification about draft RFQ documents.

Notification List (Top Screenshot):

- Filters: +DUE TODAY (0), +THIS WEEK (0), +NEXT 30 DAYS (0), +LATER (0)
- Sort by: Most Recent Activity
- Notification 1: Edward Smith (Customer) - August 21, 2024 at 4:07 AM. Schedule Narrative uploaded on Project 605304. @MTX Project Manager (Employee).
- Notification 2: Edward Smith (Customer) - August 5, 2024 at 2:47 PM. @Aleksey N Belov (Employee) Draft RFQ docs have been uploaded.

Notification List (Bottom Screenshot):

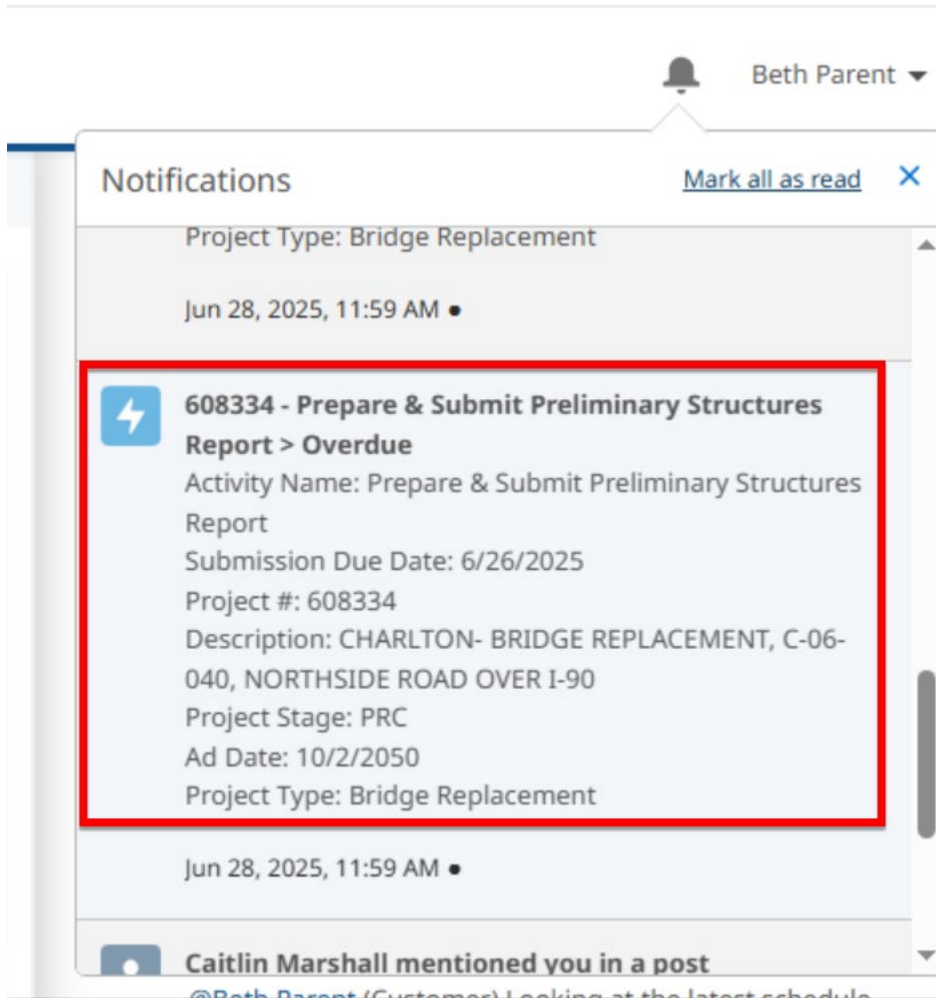
- Sort by: Created By
- 4 items - Sorted by Created By - Filtered by All notifications - Updated a few seconds ago

	Recipie...	Creat...	Pr...	D...	Subject	Bell No...	Recipie...	Created...
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...

Notification Detail (Bottom Screenshot):

- Refresh
- Notification: @Aleksey N Belov (Employee) Draft RFQ docs have been uploaded.

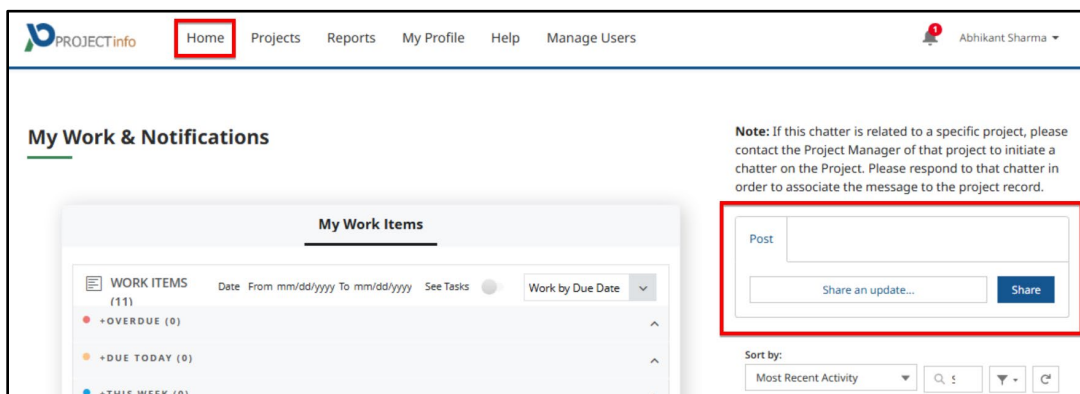
Users can also view the notification alerts from the Bell Notification button.



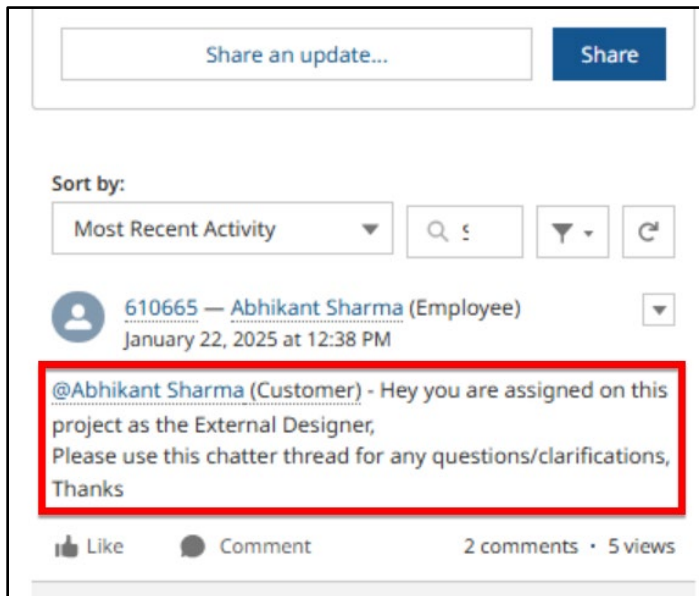
4.3.3 Chatter

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

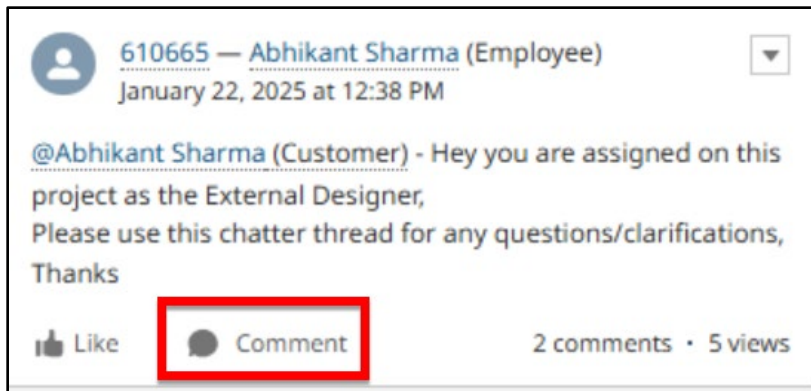
1. Go to the **Home** Tab and Locate Chatter section on the right side of the page.



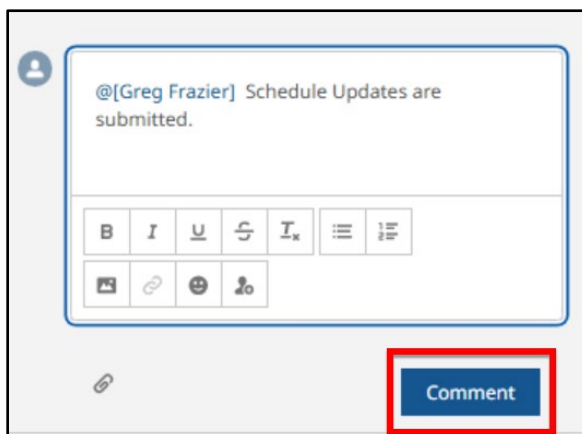
2. Scroll down and locate a **Chatter** posted by the Project Manager regarding Project assignment.



3. Click on **Comment**.



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



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.**

Project #	Description	Project Manager	Project Manager Email	District	Municipality	Ad Date	Office Estimate
613773	DISTRICT 4- SIDEWALK REPAIRS & IMPROVEMENTS AT VARIOUS LOCATIONS	MTX Project Manager	dotprojectinfomod+qa31	District 4		10/05/2024	\$695,000.00

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 #	Description	Project Mana...	Project Ma...	District	Municipality	External Design Lead Contac...	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	!

4.4.2 External Design Lead Contact Requesting Access to a Project

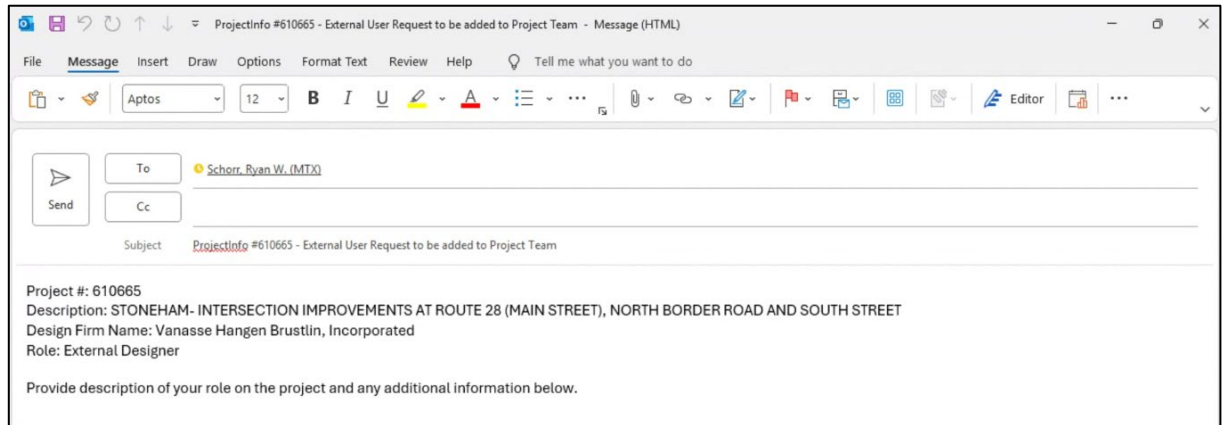
External Design Lead Contact needs to request access to get direct access for a specific project listed under **All Projects (My Firm)**:

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

The screenshot shows the PROJECTinfo interface. The 'Projects' menu item is highlighted with a red box. Below it, the 'My Projects' section shows 'All Projects (My Firm)' selected. A blue notification bar states: 'To request access to a project below, please click on the Project Manager's email and provide the required information'. Below this is a table with columns: Project #, Description, Project Manager, Project Manager Email, District, Municipality, Ad Date, and Office Estim. The first row shows project 610665 for Ryan Schorr, with the email 'ryan.w.schorr@dot.state.r' highlighted in a red box. A red arrow points to this email address.

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.



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.

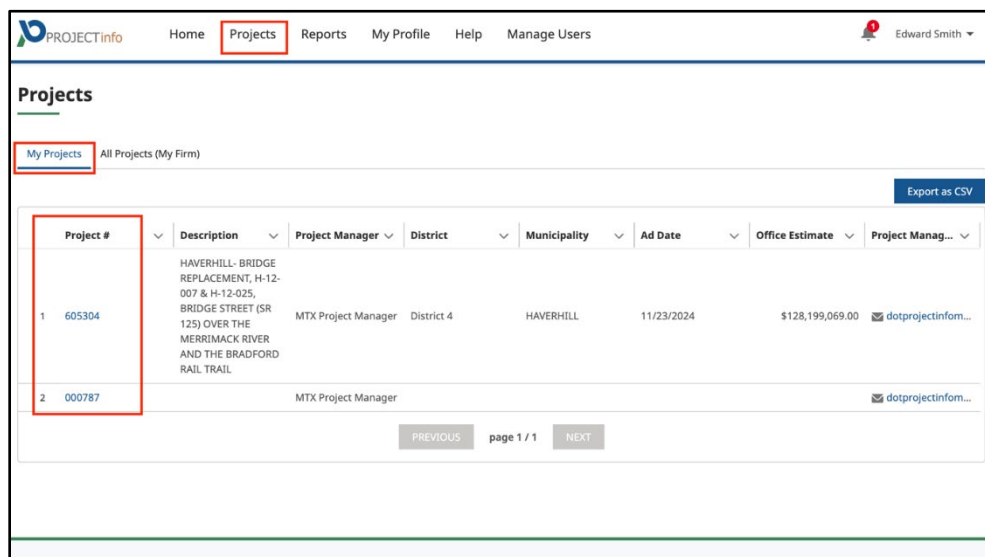
4.4.3 My Project

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.



The user is directed to the selected Project.

PROJECTinfo Home Projects Reports My Profile Help Manage Users Edward Smith

605304 HAVERHILL- BRIDGE REPLACEMENT, H-12-007 & H-12-025, BRIDGE STREET (SR 125) OVER THE MERRIMACK RIVER AND THE BRADFORD RAIL TRAIL

Project Manager: MTX Project Manager Project Type: Bridge Replacement Program: Bridge Responsible District: District 4 MPO: Merrimack Valley Assigned Section: Statewide Operations	PRC Status: Approved(8/11/2011) Design Responsibility: MassDOT Consultant ROW Responsibility: MassDOT Consultant: WSP Attribute(s): AC; BR ON; D-B; STIP STIP Year(s): 2024; 2025; 2026; 2027; 2028	Ad Date: 11/23/2024 PS&E to FAPRO: Designer Readiness Date: 11/17/2028 Contract Cost: \$142,323,175.90 TFPC: \$150,838,839.35 STIP Cost: \$129,400,000.00
----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

PIF 10/24/2008 → PRC 8/11/2011 (Approved) → Pre-25% → **25% Design** 8/5/2024 → 75% Design → 100% Design → Final Design → Advertising 11/23/2024 (Scheduled) → Construction

Details Search Schedule Live Schedule Edit Schedule Initiation & Sc... Facility Info Management Review Documents Communication Advertising

Information

Description: HAVERHILL- BRIDGE REPLACEMENT, H-12-007 & H-12-025, BRIDGE STREET (SR 125) OVER THE MERRIMACK RIVER AND THE BRADFORD RAIL TRAIL
 Extended Project Description: Bridge H-12-007 is NR (National Register) Eligible and H-12-025 is not NR Eligible. The existing two bridges shall be combined into one proposed bridge if this is a bridge replacement project. If it is determined that a "historically sensitive" rehabilitation is not a feasible alternative then the proposed bridge shall include historical sensitive elements in its appearance.

4.5 Project Record

4.5.1 Navigating to Project Record

To navigate to the Project Record:

1. Under My Projects, select the hyperlink for the listed Project
2. User is navigated to Project Record for that Project
3. User can see a header with project specific information and several tabs.

4.5.2 Tags

4.5.2.1 ROW Tab (Right of Way & Environmental)

The External Designer can access Right of Way and Environmental tab. To do so, follow the steps below:

1. Go to the **Project**
2. Go to the **ROW Tab**
3. **Right Of Way** and **Environmental tab** are displayed as sections

Details Search Schedule Live Schedule Edit Schedule Initiation & Sco... Facility Info Management Review Documents **Costs & Progr...** More

PROJECT ESTIMATE

Project Estimate

Office Estimate \$ 3,132,000.00

Current Estimate

Advertising Cost	Office Estimate	Estimated Total Contrac...	Estimated Total Constr...	Estimated TFPC Cost	Municipal Bid Items Cost
\$3,523,560.00	\$3,132,000.00	\$4,369,200.00	\$4,821,780.00	\$4,775,250.00	\$0.00

4.5.2.4 Management Tabs (Project Team)

The External Designer can access Project Team tab to view users assigned on the Project. To do so, follow the steps below.

1. Go to the **Project**
2. Go to the **Management Tab**
3. **Project Team** tab will display the various teams involved on the project

Details Search Schedule Live Schedule Edit Schedule Initiation & Sco... Facility Info **Management** Review Documents Costs & Progra... More

PROJECT TEAM

Management Team

Project Manager	Adetoyin Olaoye	Section Director	Director MassDOT Section
Alternate Project Manager		Program Manager	Hung Pham

PROJECTinfo Home Projects Reports My Profile Help Manage User Edward Smith

605304 HAVERHILL- BRIDGE REPLACEMENT, H-12-007 & H-12-025, BRIDGE STREET (SR 125) OVER THE MERRIMACK RIVER AND THE BRADFORD RAIL TRAIL

Project Manager: MTX Project Manager Project Type: Bridge Replacement Program: Bridge Responsible District: District 4 MPO: Merrimack Valley Assigned Section: Statewide Operations	PRC Status: Approved(8/11/2011) Design Responsibility: MassDOT Consultant ROW Responsibility: MassDOT Consultant: WSP Attribute(s): AC; BR ON; D-B; STIP STIP Year(s): 2024; 2025; 2026; 2027; 2028	Ad Date: 11/23/2024 PS&E to FAPRO: Designer Readiness Date: 11/17/2028 Contract Cost: \$142,323,175.90 TFPC: \$150,838,839.35 STIP Cost: \$129,400,000.00
----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

PIF 10/24/2008 → PRC 8/11/2011 (Approved) → Pre-25% → **25% Design** 8/5/2024 → 75% Design → 100% Design → Final Design → Advertising 11/23/2024 (Scheduled) → Construction

Details Search Schedule Live Schedule Edit Schedule Initiation & Sc... Facility Info Management Review Documents Communication Advertisement

Information

Description: HAVERHILL- BRIDGE REPLACEMENT, H-12-007 & H-12-025, BRIDGE STREET (SR 125) OVER THE MERRIMACK RIVER AND THE BRADFORD RAIL TRAIL

Extended Project Description: Bridge H-12-007 is NR (National Register) Eligible and H-12-025 is not NR Eligible. The existing two bridges shall be combined into one proposed bridge if this is a bridge replacement project. If it is determined that a "historically sensitive" rehabilitation is not a feasible alternative then the proposed bridge shall include historical sensitive elements in its appearance.

4.6 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**.

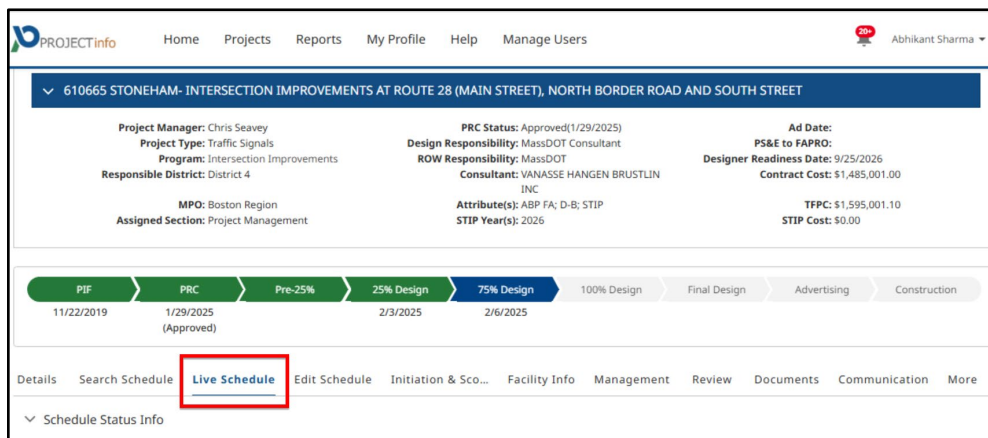
After assignment, the External Design Lead Contact can select a Design Schedule template to incorporate into the existing Initiation-PRC schedule on the **Live Schedule**.

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 [Export Project Activities as a Report](#) 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**.

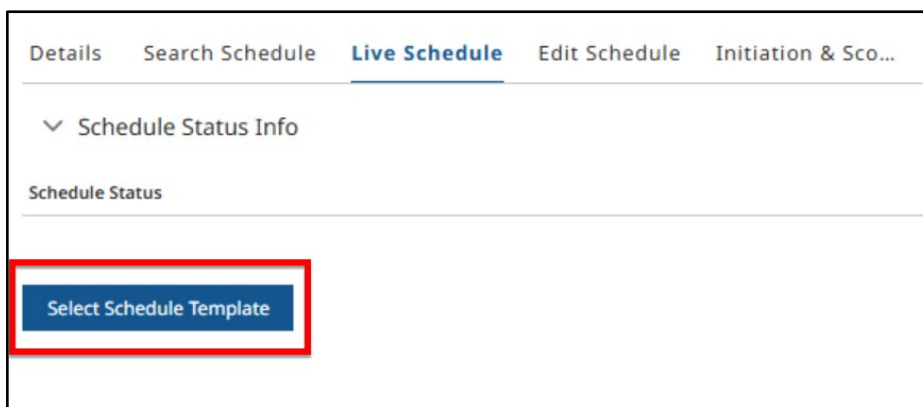


The screenshot displays the PROJECTinfo web application interface. At the top, there is a navigation bar with links for Home, Projects, Reports, My Profile, Help, and Manage Users. The user's name, Abhikant Sharma, is visible in the top right corner. The main content area shows project details for '610665 STONEHAM- INTERSECTION IMPROVEMENTS AT ROUTE 28 (MAIN STREET), NORTH BORDER ROAD AND SOUTH STREET'. Key information includes: Project Manager: Chris Seavey; Project Type: Traffic Signals; Program: Intersection Improvements; Responsible District: District 4; MPO: Boston Region; Assigned Section: Project Management; PRC Status: Approved(1/29/2025); Design Responsibility: MassDOT Consultant; ROW Responsibility: MassDOT; Consultant: VANASSE HANGEN BRUSTLIN INC; Attribute(s): ABP FA; D-B; STIP; STIP Year(s): 2026; Ad Date: PS&E to FAPRO: 9/25/2026; Designer Readiness Date: 9/25/2026; Contract Cost: \$1,485,001.00; TFPC: \$1,595,001.10; STIP Cost: \$0.00. Below the project details is a horizontal schedule bar with stages: PIF (11/22/2019), PRC (1/29/2025 (Approved)), Pre-25%, 25% Design (2/3/2025), 75% Design (2/6/2025), 100% Design, Final Design, Advertising, and Construction. At the bottom, there is a navigation menu with options: Details, Search Schedule, Live Schedule (highlighted with a red box), Edit Schedule, Initiation & Sco..., Facility Info, Management, Review, Documents, Communication, and More. A 'Schedule Status Info' dropdown is also visible.

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

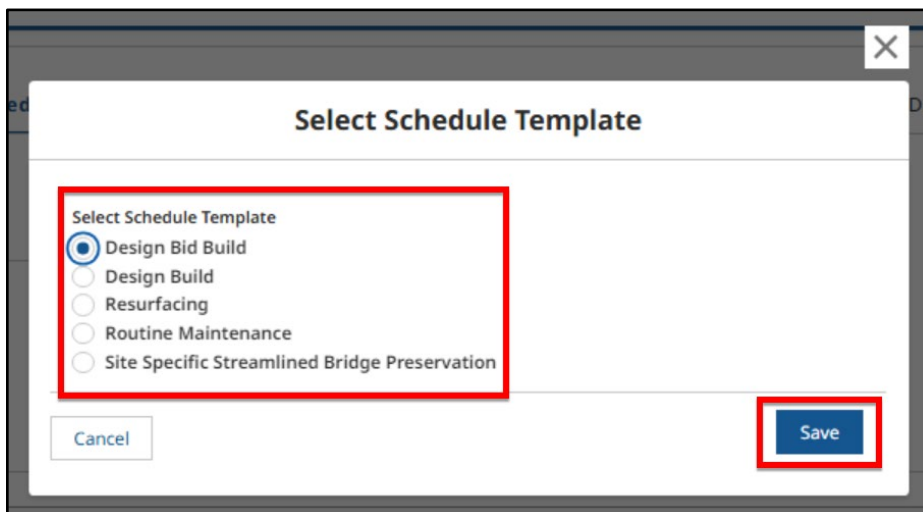
ID	Name	Start	End
	Plan Board(610665)	12/19/2019	01/12/2025
1	Initiation-PRC	12/19/2019	01/12/2025
1.1	Project Initiation Form (PIF) Approved	01/12/2025	01/12/2025
1.2	Pre-PRC Evaluation Meeting(s)	01/09/2025	01/09/2025
1.3	Submit to Project Review Committee (PRC)	01/09/2025	01/09/2025
1.4	PRC Meeting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

- Click **Select Schedule Template** under the **Schedule Status Info** section.

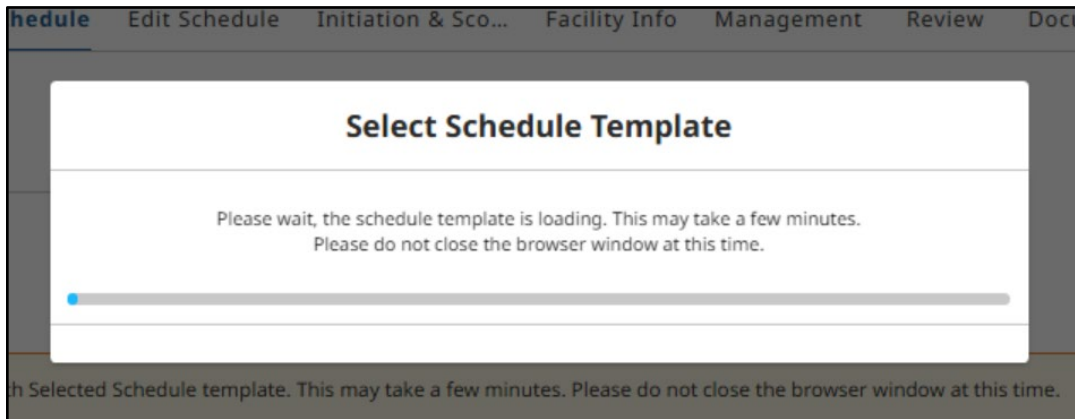


A **Select Schedule Template** pop-up displays.

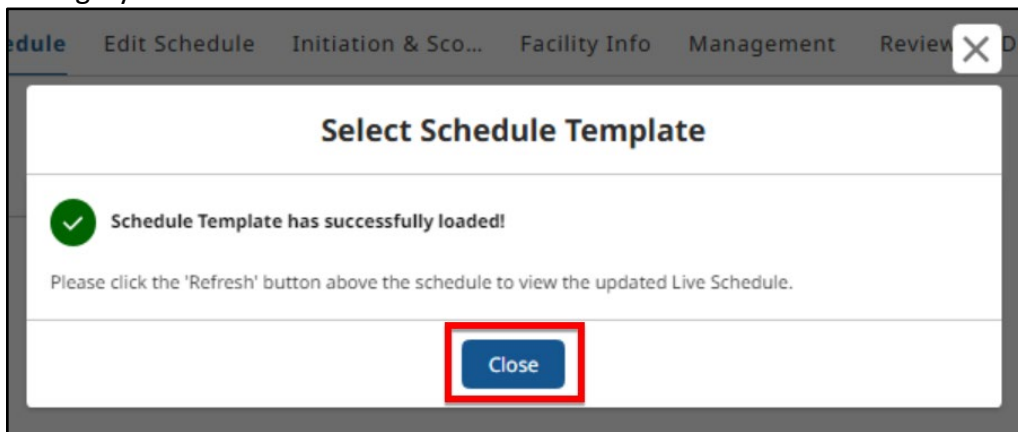
- Click on the radio button next to the desired Schedule Template and click the **Next** button. **Note:** In this example the Design Bid Build Template is selected. The steps that follow are the same regardless of the Selected Template.



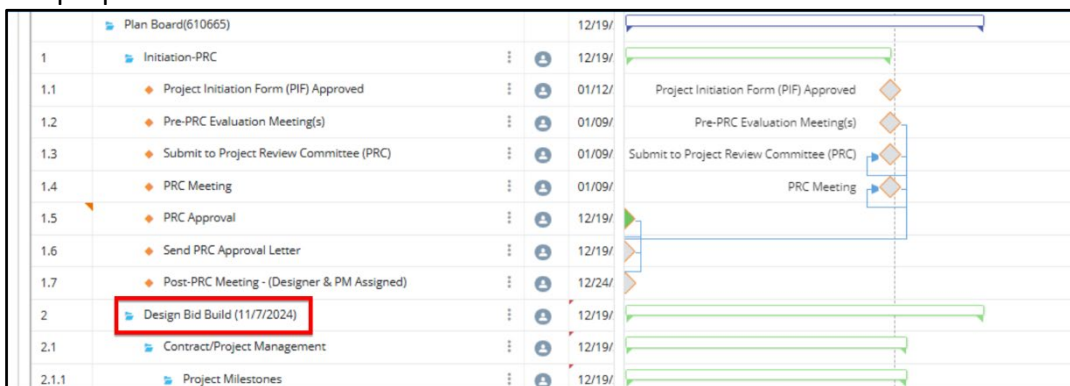
- A progress bar is displayed while the schedule template is loading.



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**.



9. If no Schedule is selected "A **Schedule Template** has not been selected by the Designer(s)." message is displayed.

A Schedule Template has not been selected by the Designer(s).

Sharath External contact has been granted Edit Access to the Live Schedule.

10. If baseline schedule is not accepted then **Baseline Schedule** has not been accepted yet; do not update the **Live Schedule** at this time. Message is displayed.

Baseline Schedule has not been accepted yet; do not update the **Live Schedule** at this time.

Sharath External contact has been granted Edit Access to the Live Schedule.

Schedule Status Info

Schedule Status 02/03/2026 - Baseline Schedule submitted for Review

Missing Dependencies

Add Combo Submission

View Activity History Disabled

11. Viewing Live schedule activity history by click on **Toggle (View Activity History)**

Baseline Schedule has not been accepted yet; do not update the **Live Schedule** at this time.

Schedule Status Info

Schedule Status 02/03/2026 - Baseline Schedule submitted for Review

Missing Dependencies

Add Combo Submission

View Activity History Enabled

Activity History

Bell notification

4.7 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.

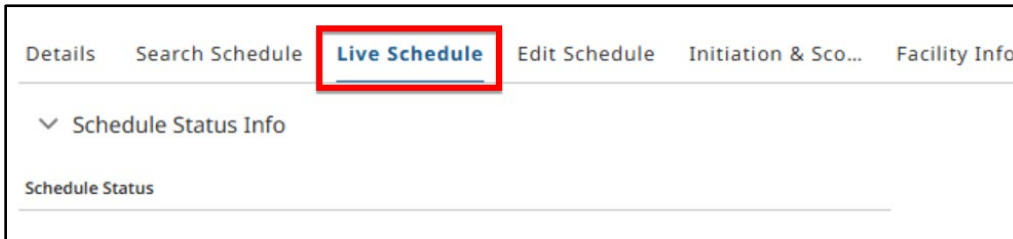
An **Add Combo Submission** is a combined submission of different project stages, such as 25% and 75% design. When a combo submission is completed, the application automatically updates the **Project Stage** to the higher of the two stages.

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.

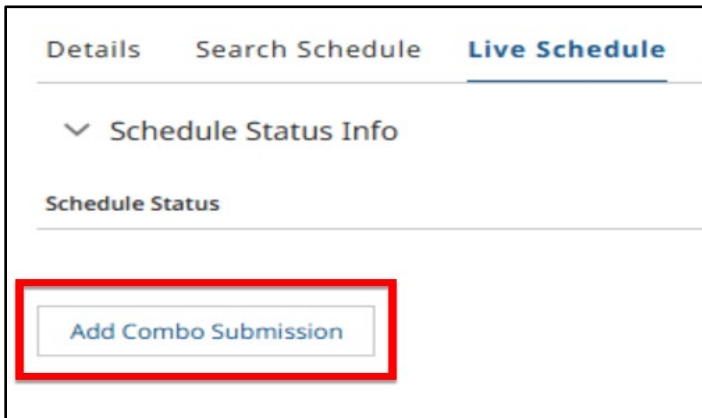
Activity Submission	Project Progress
Prepare and Submit 25%/75% Design Submission	Project will move to 75% stage
Prepare and Submit 75%/100% Design Submission	Project will move to 100% Stage
Prepare and Submit 100%/PS&E Submission	Project will move to Final Stage

To add a **Combo Submission**,

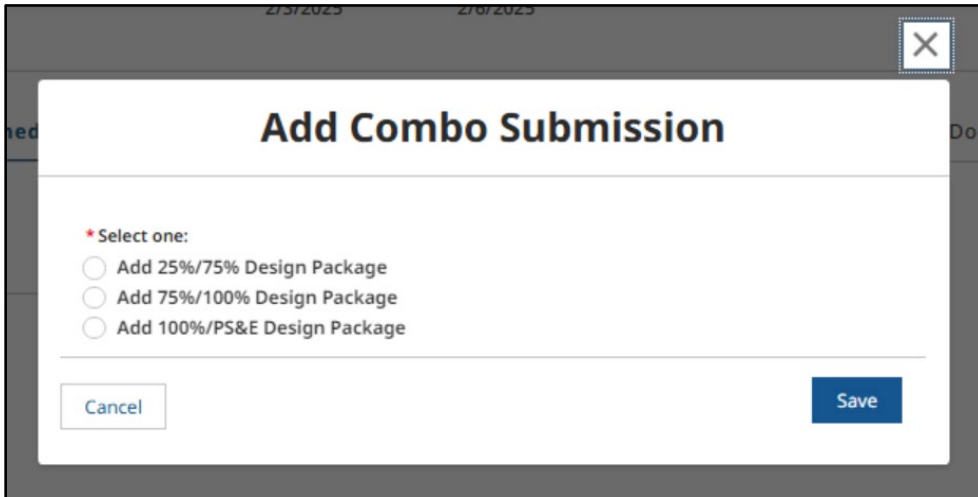
1. Go to the **Project**
2. Click on **Live Schedule** Tab



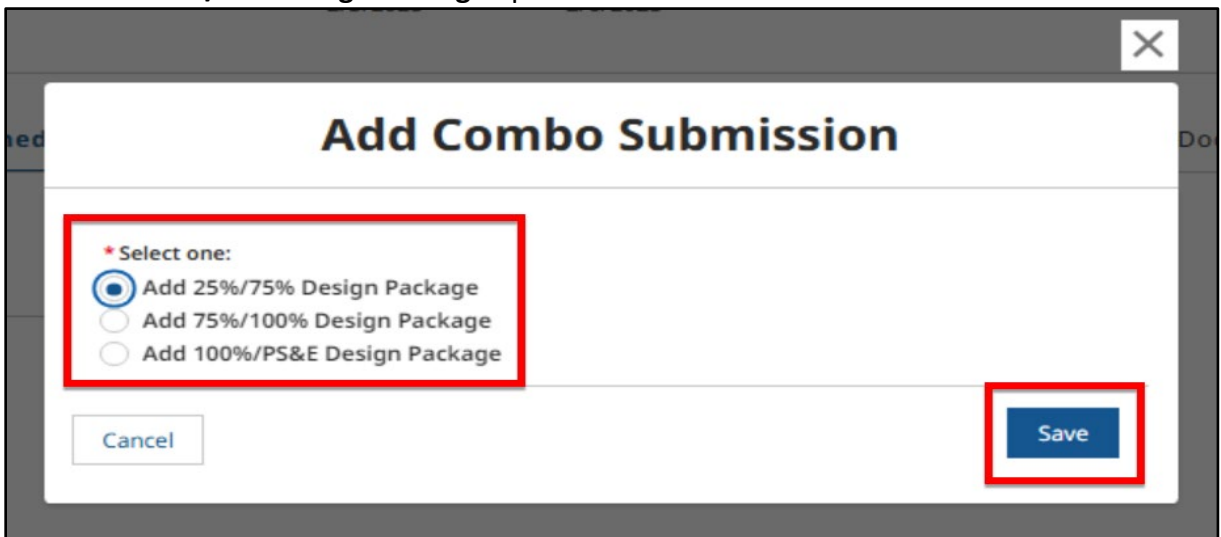
3. Click **Add Combo Submission**



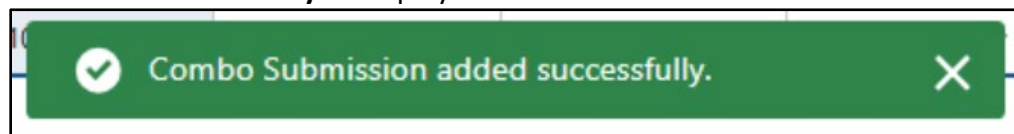
4. Once clicked, it displays the types of Combo Submission that can be added on the **Live Schedule**:



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

4.8 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**.

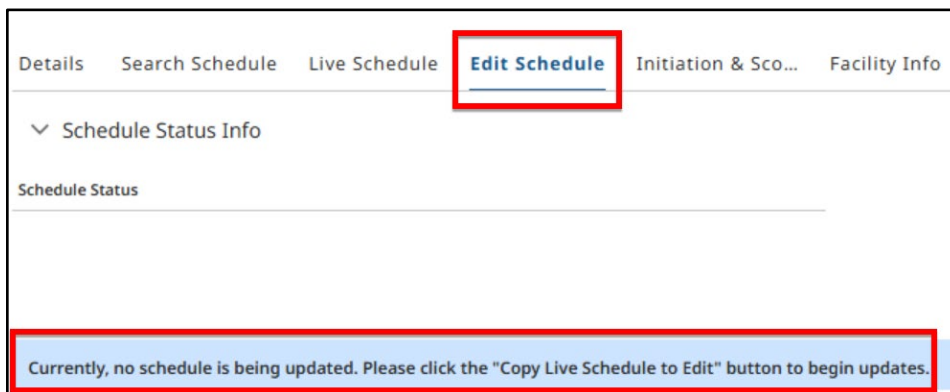
4.8.1 Copying a Live Schedule

Note: Add the Combo Submission on the Live Schedule first, if required. Refer to the [Add Combo Submission](#) section for detailed instructions.

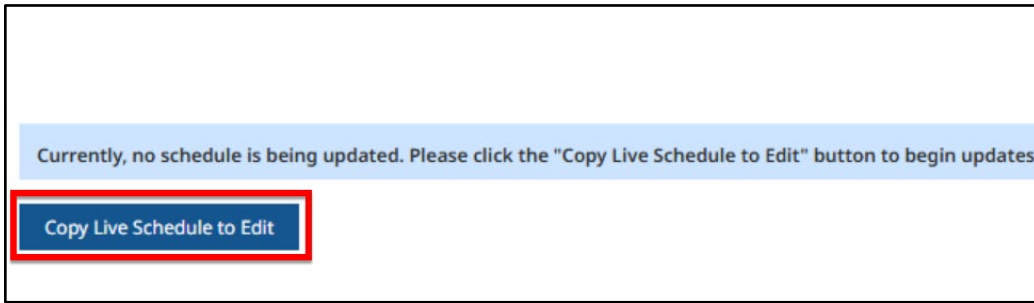
To make a copy of the **Live Schedule**, follow the steps below:

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

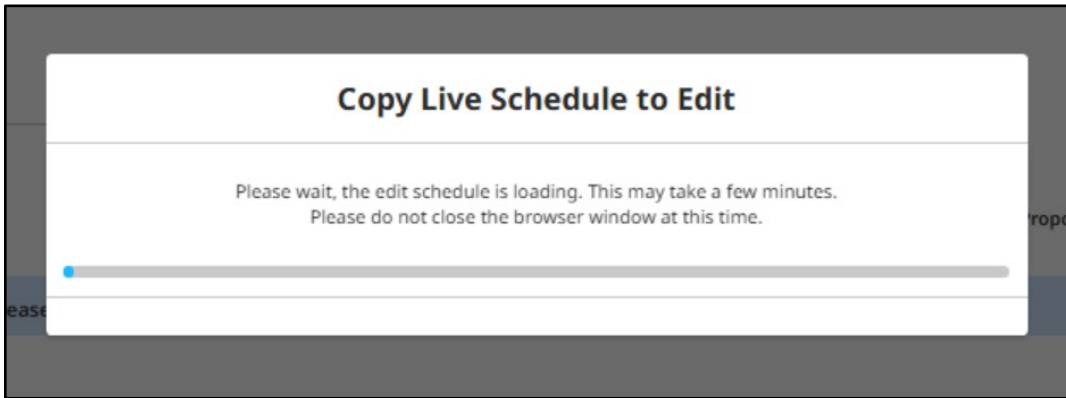
Note: If no schedule is currently being updated, an alert will be displayed on the page.



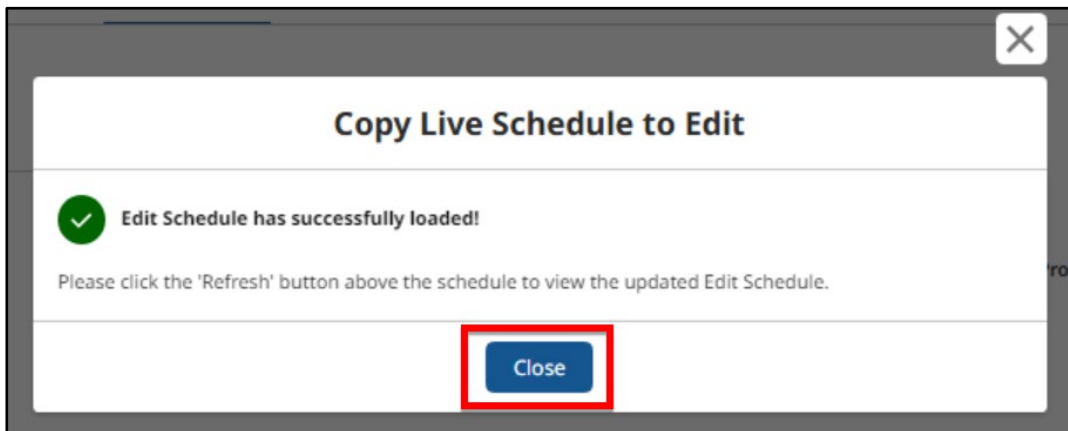
3. Click **Copy Live Schedule to Edit**.



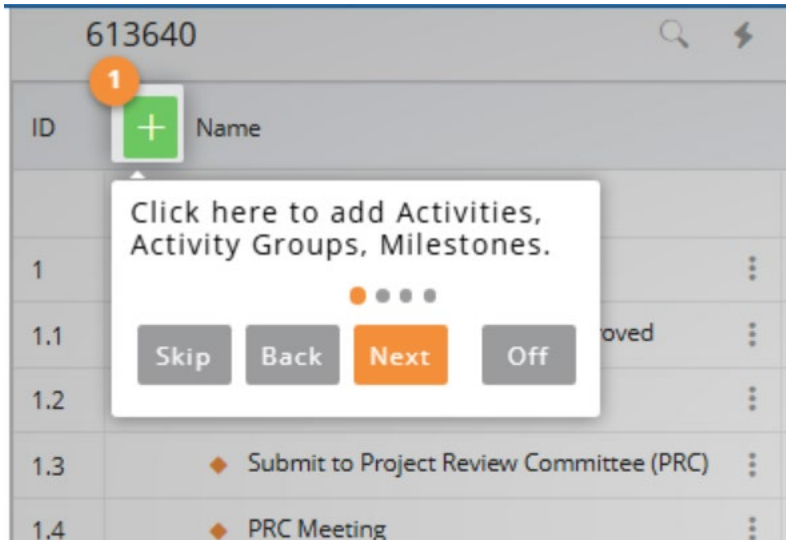
4. A progress bar is displayed while the Copy of the Live Schedule under the Edit Schedule is being generated.



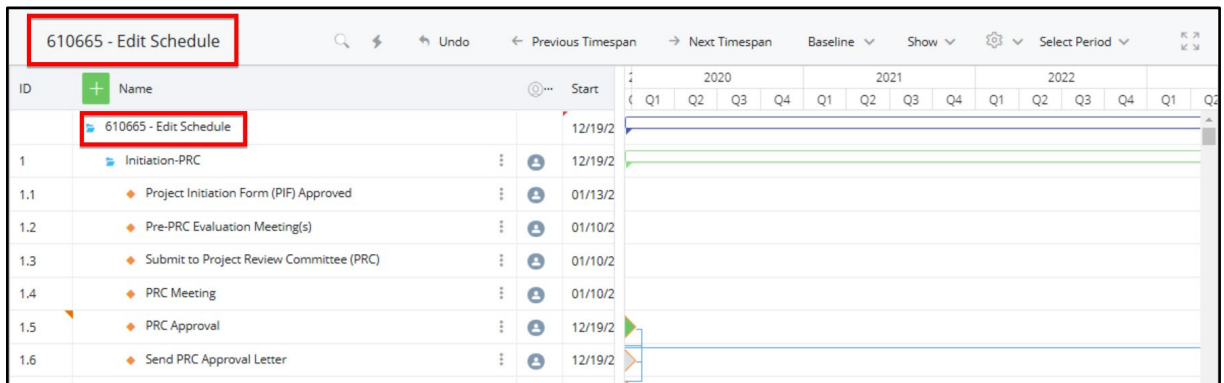
5. A success screen is displayed once the progress bar is complete. Close this screen and wait for the schedule loading to be completed.



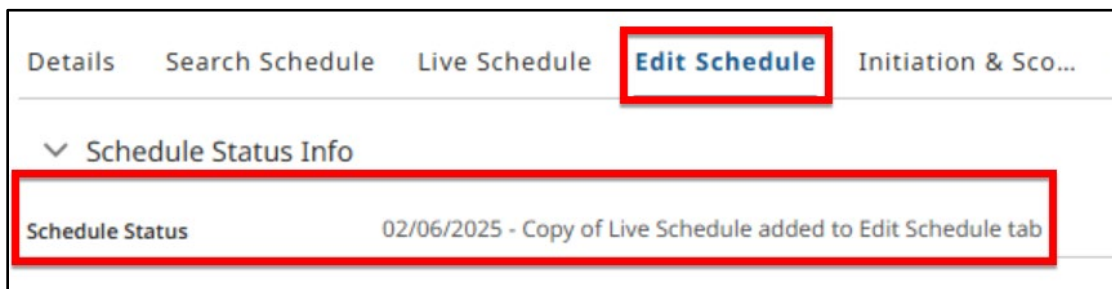
You would also see the following popup. Click Turn Off or Skip to close it.



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



- 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'*.



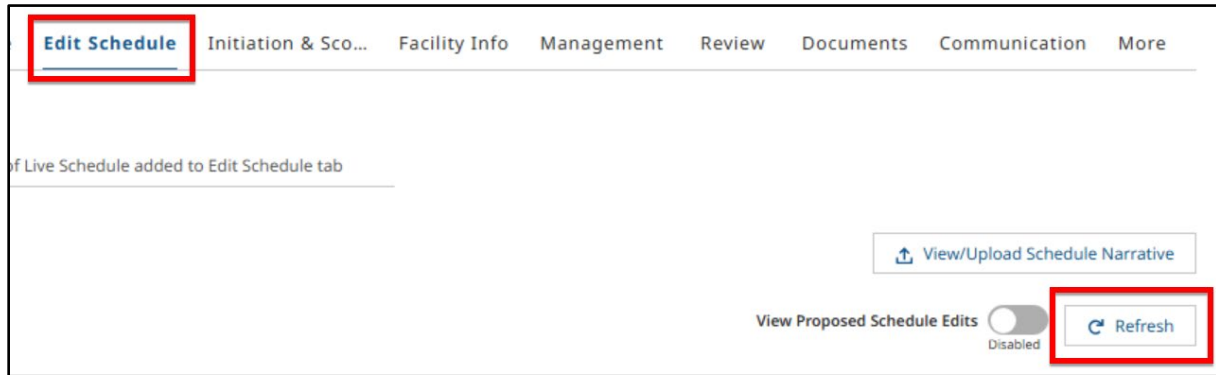
4.8.2 [Viewing and Customizing the Edit Schedule](#)

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:

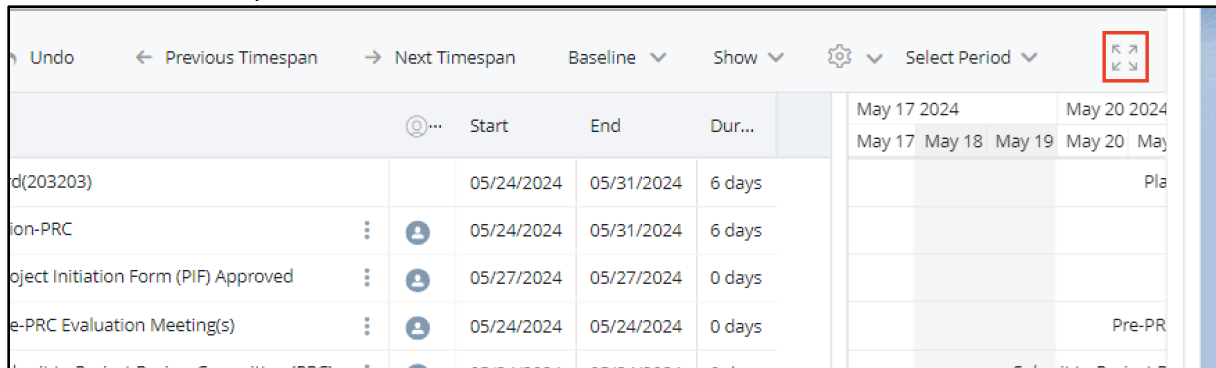
Refresh button:

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.

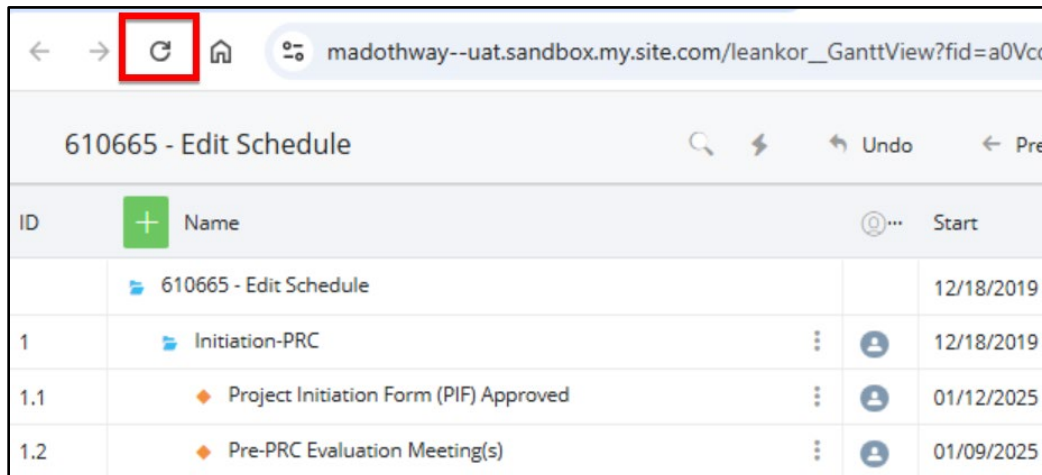


Expanded View:

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.




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.

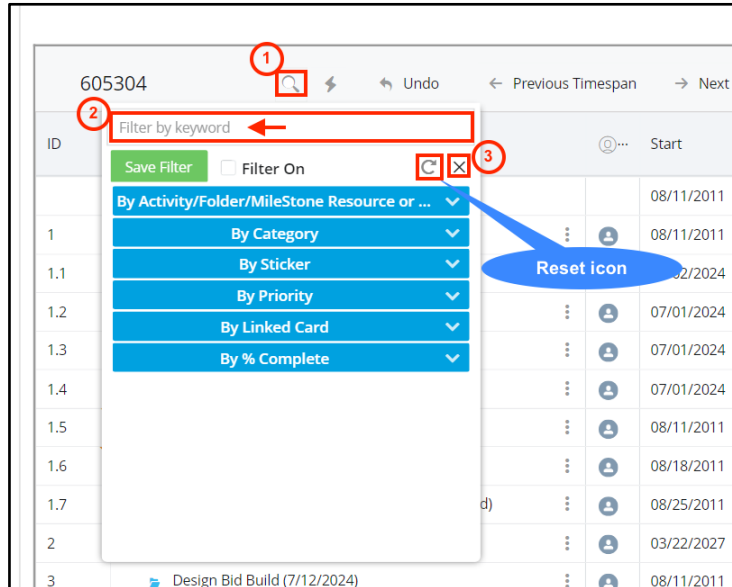


Filter Activities/Milestones by Key Words:

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

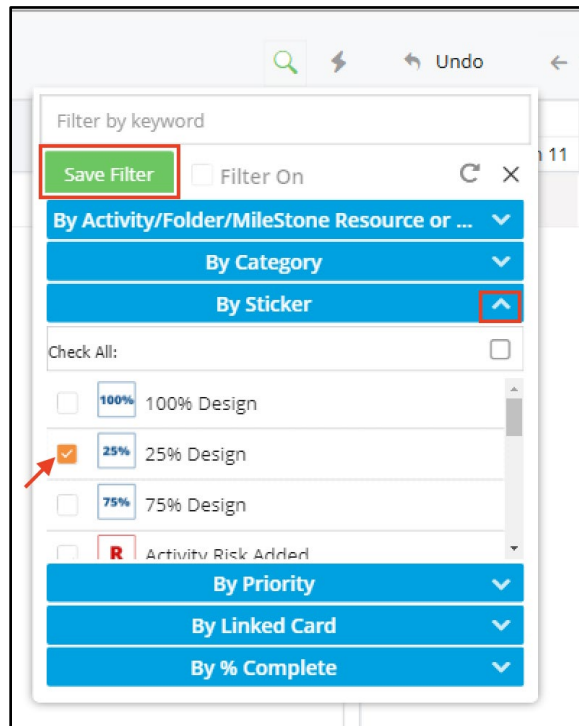
1. Select the **Search** icon ().

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 (). To see updated results, click on the **X** icon.

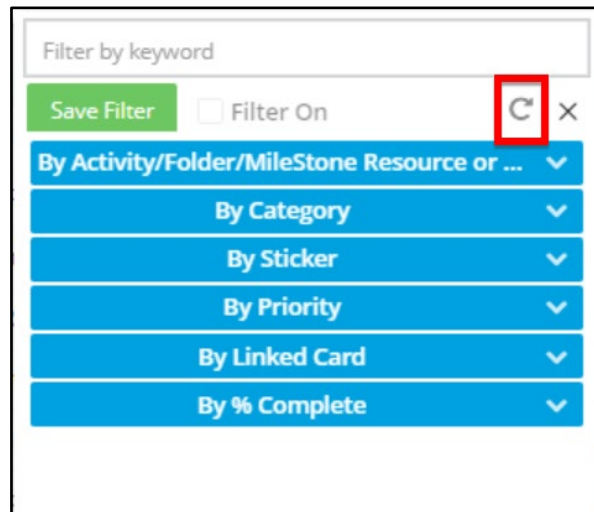


Note:

- 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:

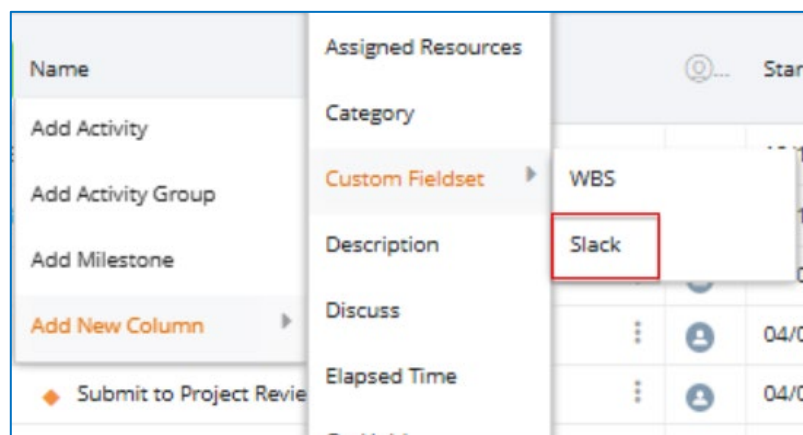
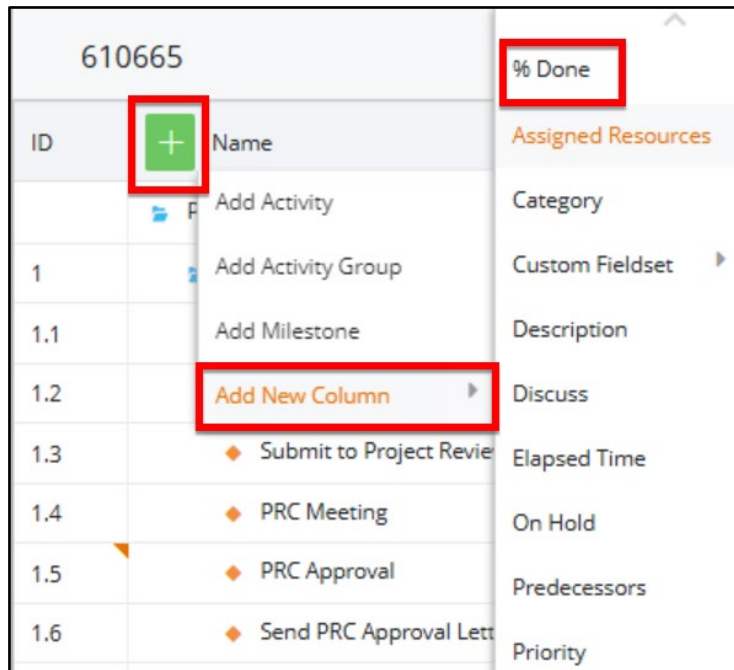


- Users can also reset the filters after use, by clicking on the **Reset Icon**



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.

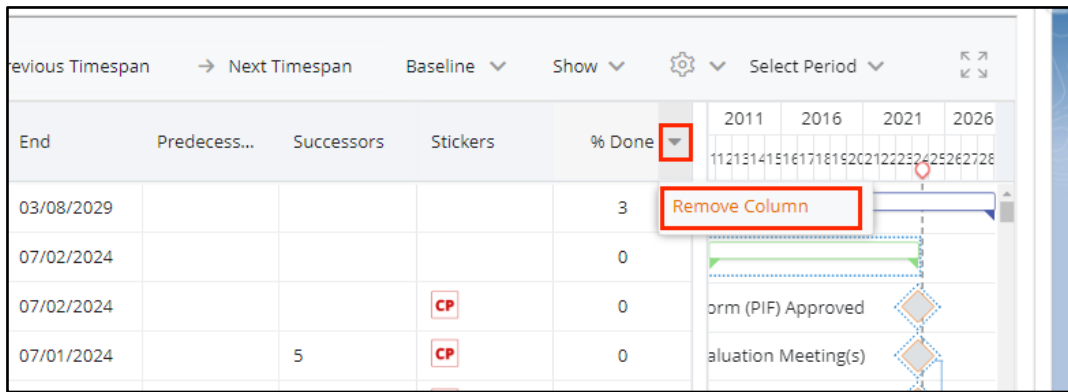


3. The selected column will be displayed on the Schedule.

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

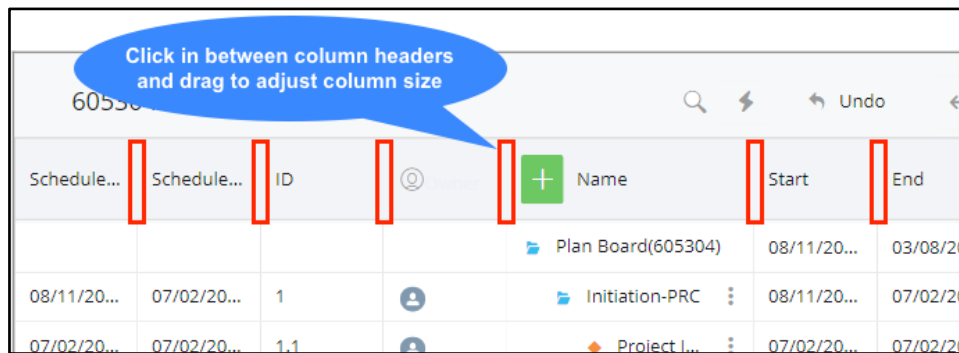
Removing Columns:

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

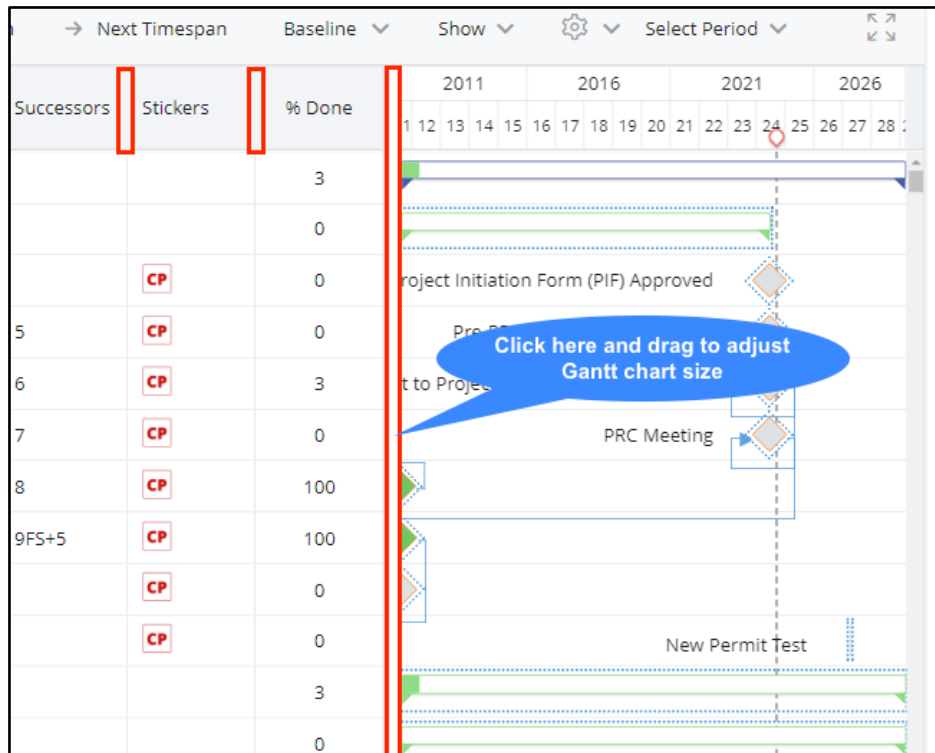


Adjusting column/Gantt chart size:

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

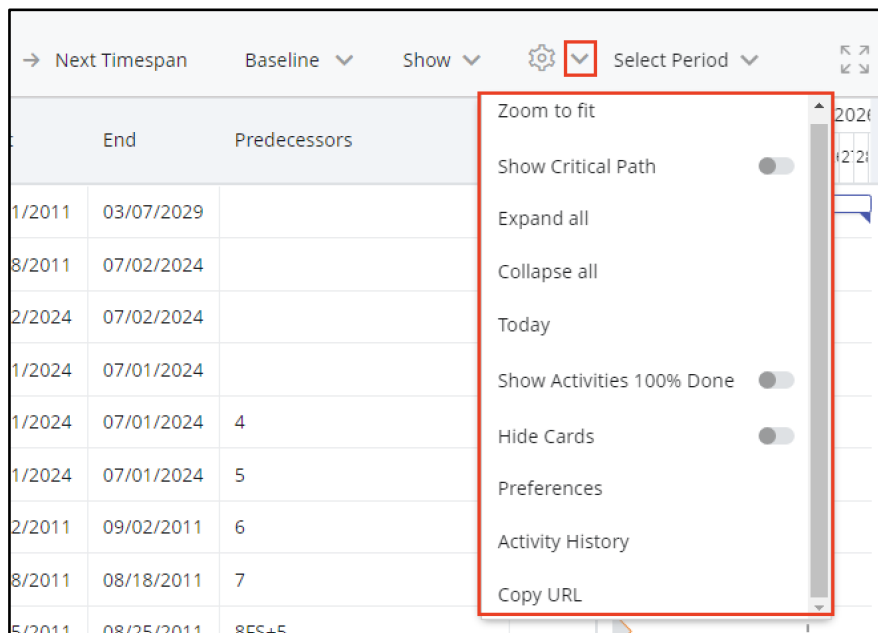


2. Similarly, click on the Gantt chart separation line and drag (Left/Right) to adjust the Gantt column size.



Gear Icon:

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



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.

4.8.3 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 [Viewing and Customizing the Edit Schedule](#) 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 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:

1. 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)**.
4. 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 [Reviewing Ad Date on the Edit Schedule Gantt Chart](#) section for the steps to view Ad Date.

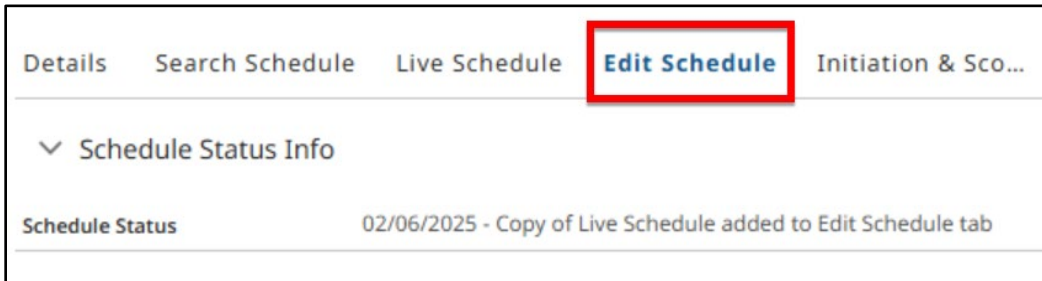
4.8.3.1 Updating Completed Activities

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

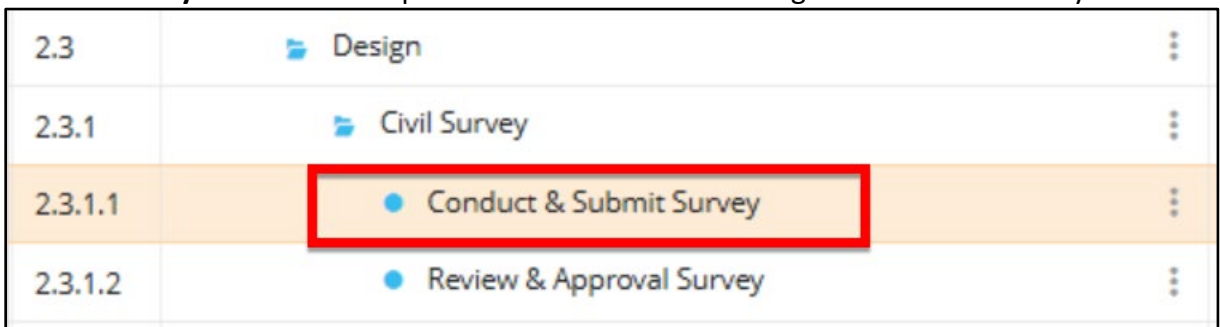
For all Activities that were completed prior to the ProjectInfo Baseline Submission, the **Completion Date(s)** must be corrected on the **Edit Schedule**. Additionally, these activities must be marked as '**Manually Scheduled**'. The External Design Lead Contact may refer to the most recent **Microsoft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



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.



The screenshot shows a list of tasks in a software interface. The tasks are organized into a hierarchy. The first task is '2.3 Design' with a folder icon and three vertical dots on the right. Below it is '2.3.1 Civil Survey' with a folder icon and three vertical dots. The third task, '2.3.1.1 Conduct & Submit Survey', is highlighted with a red rectangular box and has a blue circular icon to its left. Below it is '2.3.1.2 Review & Approval Survey' with a blue circular icon and three vertical dots.

2.3	Design	⋮
2.3.1	Civil Survey	⋮
2.3.1.1	Conduct & Submit Survey	⋮
2.3.1.2	Review & Approval Survey	⋮

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

Name	Start
Design	12/20/2019
Civil Survey	04/19/2020
Conduct & Submit Survey	04/19/2020
Review & Approval Survey	
Bank Full Width (BFW) Survey	
Conduct & Submit BFW Survey	
Review & Approval of BFW Survey	
Wetland Resource Area Delineation	
Conduct & Submit Wetlands Delineation	
Functional Design Report	

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

Activity Info

- Status
- Log Time
- Risk
- Subscribers
- Custom Fields
- Resource
- Activity Mode
- Stickers
- System - Do Not Use

Category: Default

Title: Conduct & Submit Survey

Description:

Assign an Owner: Abhikant Sharma

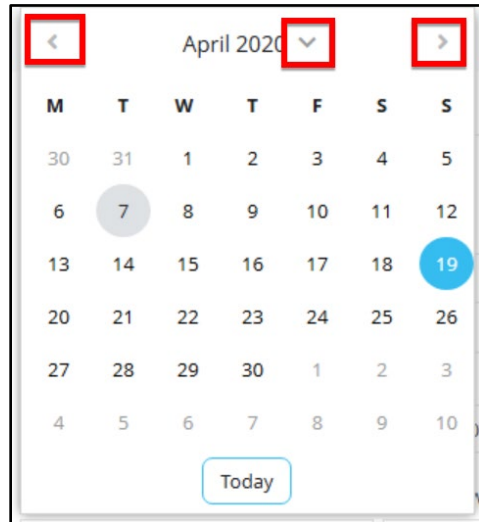
Priority: None

Start Date: Apr 20 2020

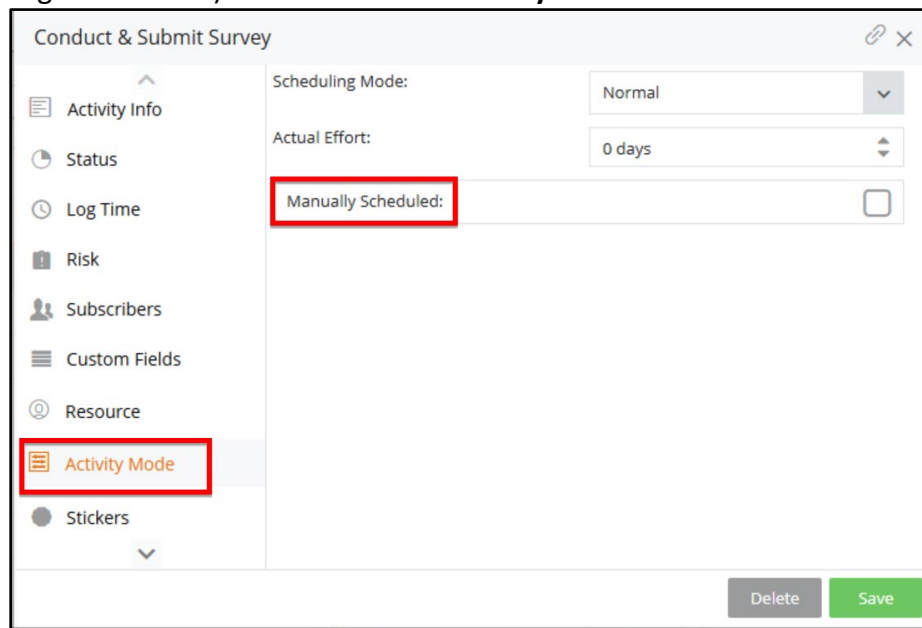
End Date: Jun 18 2020

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.



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.



8. Select the **Manually Scheduled** checkbox and click **Save**.

The screenshot shows a web form titled "Conduct & Submit Survey". On the left is a navigation menu with items: Activity Info, Status, Log Time, Risk, Subscribers, Custom Fields, Resource, Activity Mode (highlighted), and Stickers. The main form area contains:

- Scheduling Mode: Normal (dropdown)
- Actual Effort: 0 days (dropdown)
- Manually Scheduled: (checkbox, highlighted with a red box)

 At the bottom right, there are two buttons: "Delete" (disabled) and "Save" (active, highlighted with a red box).

Note:

- Once an activity is designated as **Manually Scheduled**, its dates will remain unaffected by any schedule updates to other activities.

4.8.3.2 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:

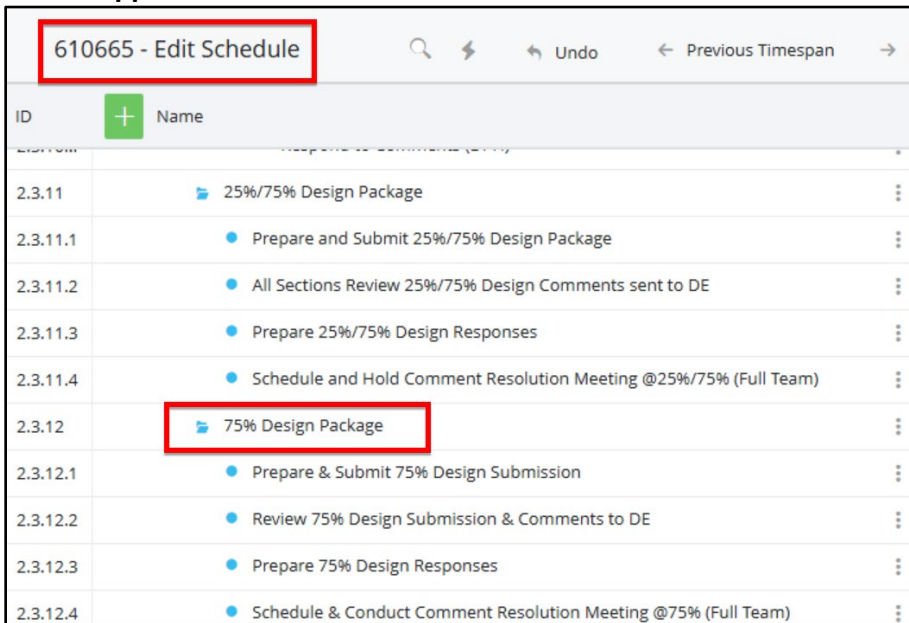
- The previous **Predecessor** activities have a **Successor** activity (other than the activity that is to be marked as **Not Applicable**)

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

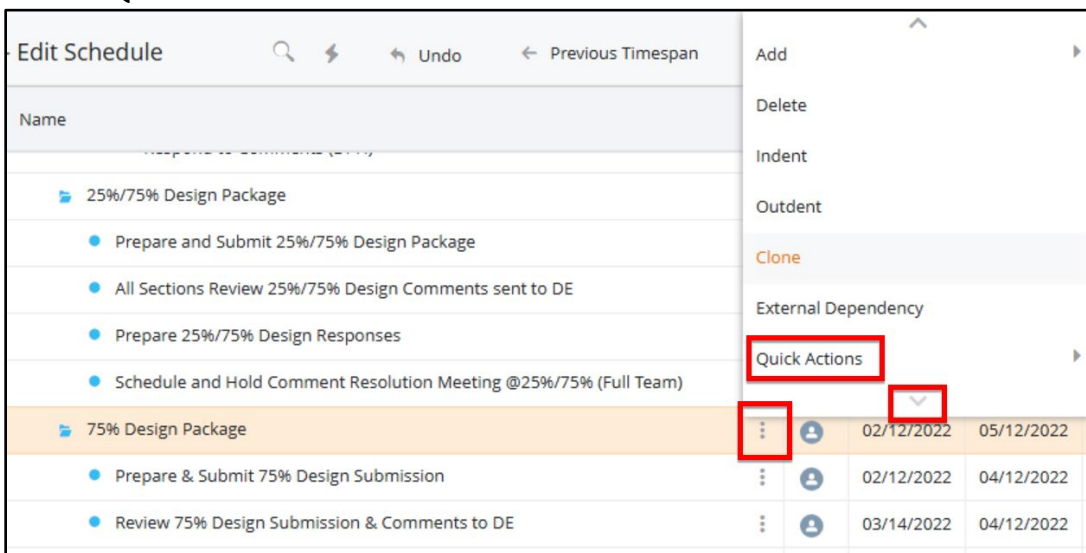
For detailed steps on updating dependencies, refer to the [Editing Dependencies](#) section.

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

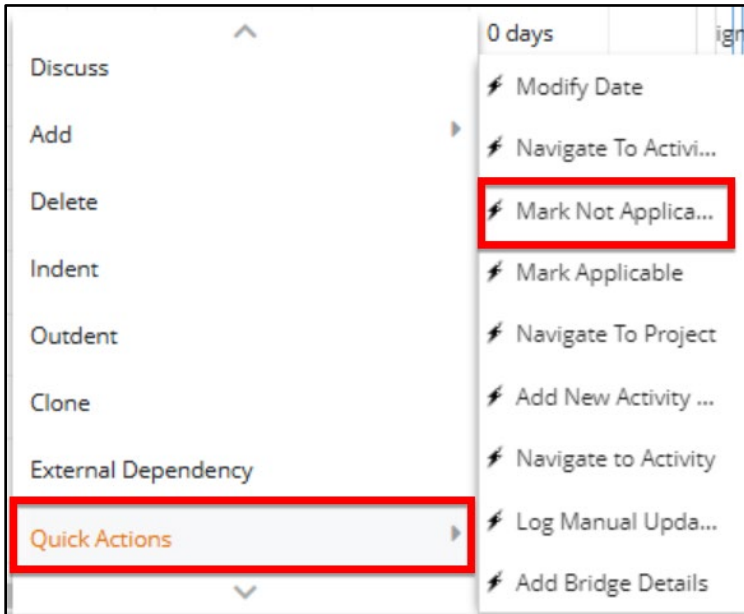
1. Go to the **Project**
2. Go to **Edit Schedule**
3. Under the **Edit Schedule**, locate the Activity Group/Activity that needs to be marked as **Not Applicable**.



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



5. Click on **Mark Not Applicable**.

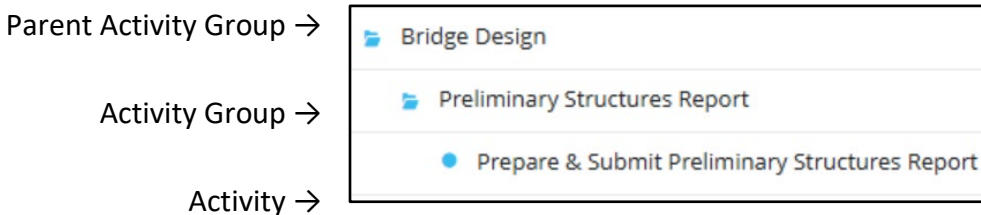


6. Once the process is complete, click **Finish** on the **Mark Activities Not Applicable** popup.



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.

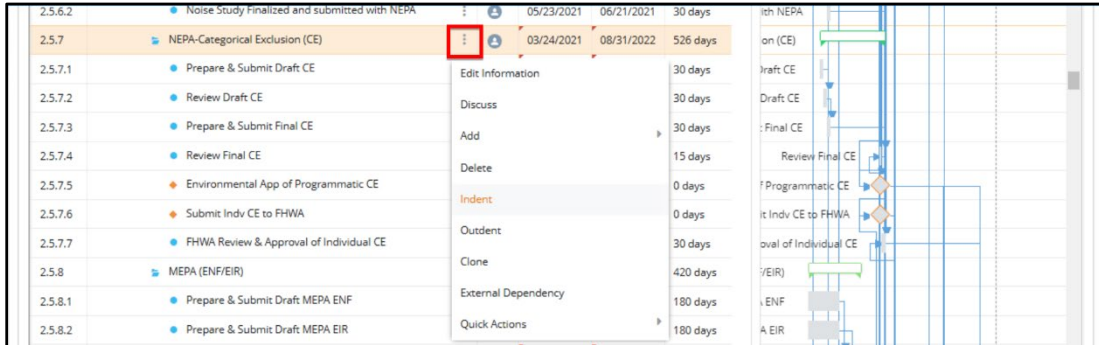
Note: Mark Not Applicable Quick Action can be used for an **Activity**, or an **Activity Group** or even a **Parent Activity Group**:



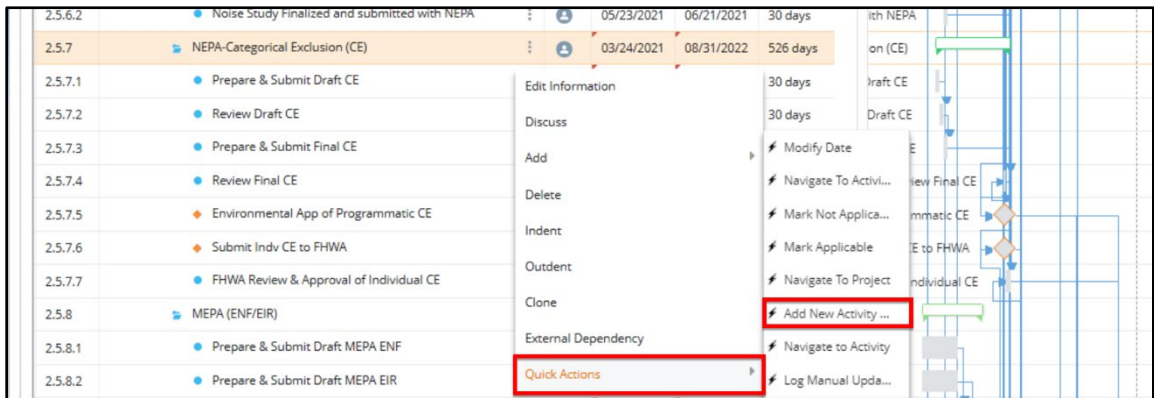
4.8.3.3 Adding Activity Groups

To add a **New Activity Group** on the Schedule:

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



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



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

This screenshot shows the 'Add New Activity Group' dialog box. The 'New Activity Group' field is highlighted with a red box. Below it, the 'Activities' section is highlighted with a red box, showing a list of activities with checkboxes: 'Prepare' (checked), 'Submit' (checked), 'Review' (checked), and 'Approval' (unchecked). Other fields include 'Start Date' and 'Activity Review Discipline' with options like 'Design', 'Traffic & Safety', 'Bridge', and '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**.

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

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

2.5.8	New Activity Group	⋮	👤	08/22/2022	08/31/2022	10 days
2.5.8.1	● Prepare New Activity Group	⋮	👤	08/22/2022	08/31/2022	10 days
2.5.8.2	● Submit New Activity Group	⋮	👤	08/22/2022	08/31/2022	10 days
2.5.8.3	● Review New Activity Group	⋮	👤	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 [Editing Dependencies](#) 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 Date** fields.

The screenshot shows the 'Activity Info' pop-up screen. The left sidebar has 'Activity Info' selected. The main form has the following fields: Category (Default), Title (Review Survey), Description (HWY.303.030), Assign an Owner (Pankaj Dwivedi), Priority (None), Start Date (Mar 26 2012), Due Date (Jun 15 2012), and Duration (60 days). The 'Assign an Owner', 'Start Date', and 'Due Date' fields are highlighted with red boxes. 'Delete' and 'Save' buttons are at the bottom right.

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**.

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

The screenshot shows the 'Custom Fields' pop-up screen. The left sidebar has 'Custom Fields' selected. The main form has the following fields: Is Activity Group (checkbox), Task Type, Area of Work, Schedule Change, Review Section, WBS Code (CNT.MS.040), Event Code, and Markup Folders Not Needed (checkbox). The 'WBS Code' field is highlighted with a red box. 'Delete' and 'Save' buttons are at the bottom right.

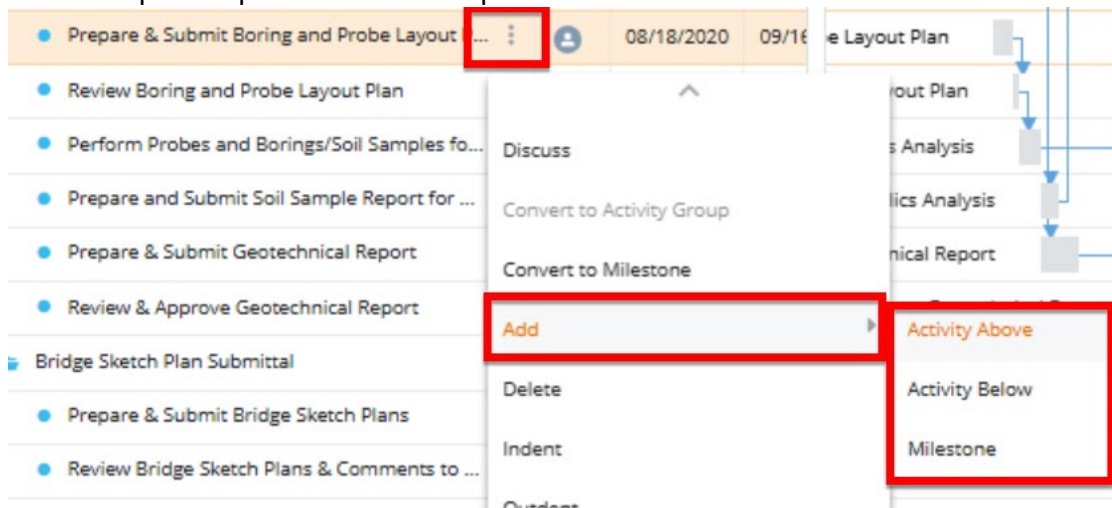
Note: The **WBS Structure** is intentionally developed to align with the **Area of Work** and the **Division/Subdivision of Work** as defined in the Scoping Workbook. **Do not modify the WBS Structure** under any circumstances. For questions regarding WBS codes for new Activity Groups, contact Project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

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

4.8.3.4 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.



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

1. The newly added **Activity** will be shown on the Schedule. Double-click the Activity to rename it.

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.

4.8.3.5 Assigning Permit type to WPA Activity Group

To add Permit Types to WPA Activity Group, follow the steps below:

1. Go to the **Live Schedule** and select **Activity Group (WPA)** and click on 3 dots.
2. Click on the **Quick Actions** and select ‘**Assign Permit Type**’

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Undo Previous Timespan Next Timespan Export Baseline Show

ID	Name	Start
2.5.9	U.S. Coast Guard Bridge Permit	07/31/2025
2.5.10	Water Quality Certification (401)	07/31/2025
2.5.11	WPA (RDA/Notice of Intent)	07/31/2025
2.5.11.1	Perform Field Work, then Prepare & Submit ...	
2.5.11.2	Review Draft RDA & Comments to DE	
2.5.11.3	Prepare & Submit Final RDA	
2.5.11.4	Review Final RDA & Comments to DE	
2.5.11.5	Prepare & Submit Draft NOI	
2.5.11.6	Review Draft NOI & Comments to DE	
2.5.11.7	Prepare & Submit Final NOI	
2.5.11.8	Review Final NOI & Comments to DE	
2.5.11.9	RDA Permit Filed	
2.5.11...	NOI Permit Filed	

Quick Actions

- Add Activity Revis...
- Add Bridge Details
- Add New Activity ...
- Add Resubmission
- Assign Permit Ty...
- Log Manual Upda...
- Mark Applicable
- Mark Not Applica...
- Navigate To Activi...
- Navigate To Activi...
- Navigate To Project

WPA (RDA/Notice of Intent)

Assign Permit Type(s)

* = Required

Please select required fields

* Municipality

BOSTON

* Permit Type

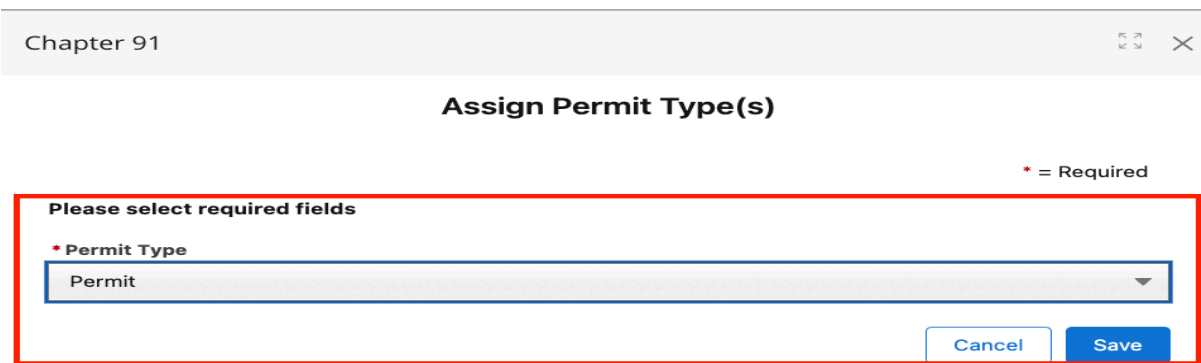
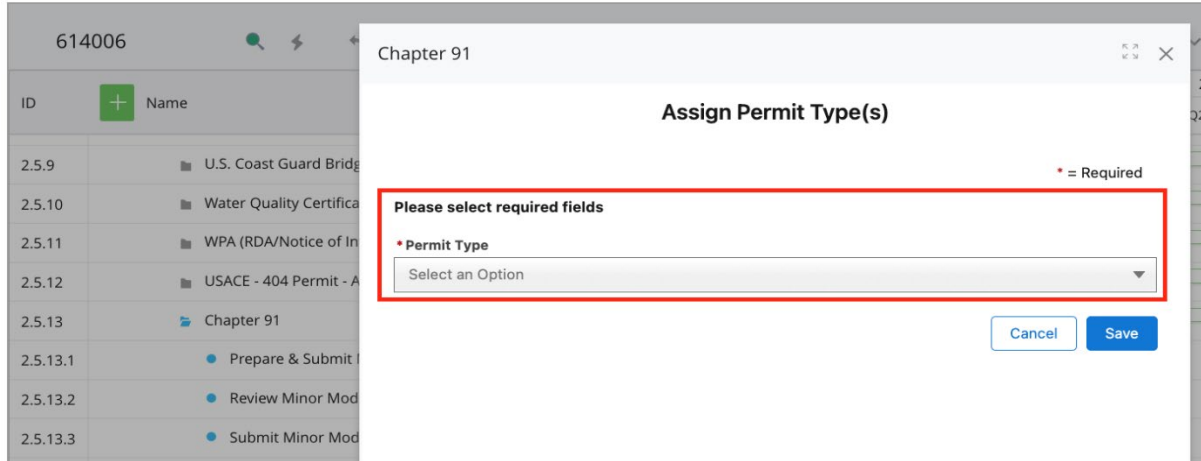
Admin Approval

Cancel Save

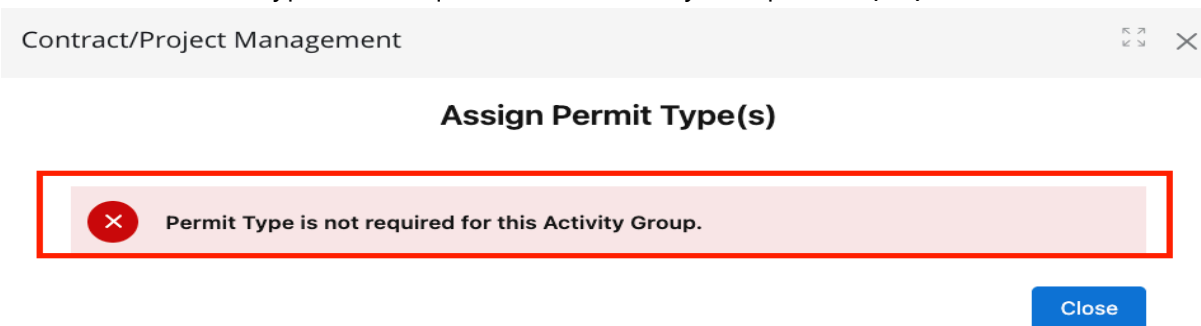
4.8.3.6 Assigning Permit Types to Environmental Activity Groups

To add Permit Types to Environmental Activity Group, follow the steps below:

1. to the **Live Schedule** and select **Activity Group (Chapter 91 or Coast Guard or Section 7 or Section 404 or Section 401 or MESA)** and click on 3 dots.
2. Click on the **Quick Actions** and select **'Assign Permit Type'**



- When user try to add permit type other than AG (**Chapter 91** or **Coast Guard** or **Section 7** or **Section 404** or **Section 401** or **MESA**) a validation error "Permit Type is not required for this Activity Group." Is displayed.



4.8.3.7 Adding Bridge details

To add Bridge details to Activity Group, follow the steps below:

- Go to the **Live Schedule** and select any **Activity Group** and click on 3 dots.
- Click the **Quick Actions** and select '**Add Bridge Detail**'

▲ **Baseline Schedule** has not been accepted yet; do not update the **Live Schedule** at this time.

Sharath External contact has been granted Edit Access to the Live Schedule.

▼ Schedule Status Info

Schedule Status 02/05/2026 - Baseline Schedule submitted for Review

Missing Dependencies

Add Combo Submission

View Activity History Disabled

Refresh

614006

ID	Name	Start	Timeline
1.7	Post-PRC Meeting - (Designer & PM Assigned)	05/20/2025	
2	Design Bid Build (12/10/2025)	05/15/2025	
2.1	Contract/Project Management	05/15/2025	
2.2	Project Development	08/29/2025	
2.3	Design		
2.4	Bridge Design		
2.5	Environmental		
2.5.1	Environmental Milestones		
2.5.1.1	Wetland Permits Filed		
2.5.1.2	Issue Environmental Clearance		
2.5.2	Environmental Review Checklist (ERC)		
2.5.2.1	Assign Environmental Analyst		
2.5.2.2	Prepare Draft ERC		

Context Menu for Project Development (ID 2.2):

- Add Activity Revis...
- Add Bridge Details
- Add New Activity ...
- Add Resubmission
- Assign Permit Ty...
- Log Manual Upda...
- Mark Applicable
- Mark Not Applica...
- Navigate To Activi...
- Navigate To Activi...
- Navigate To Project

Quick Actions:

- Add
- Delete
- Indent
- Outdent
- Clone
- External Dependency
- Quick Actions

Project Development

Please select Asset(s) to add to the activity:

Asset(s)

- Culvert
- Wall

Selected Asset(s)

- Other

* Other Bridge Dept

BD123456

Cancel Save

4.8.3.8 Marking Parent Activity Group Not Applicable via Quick Action.

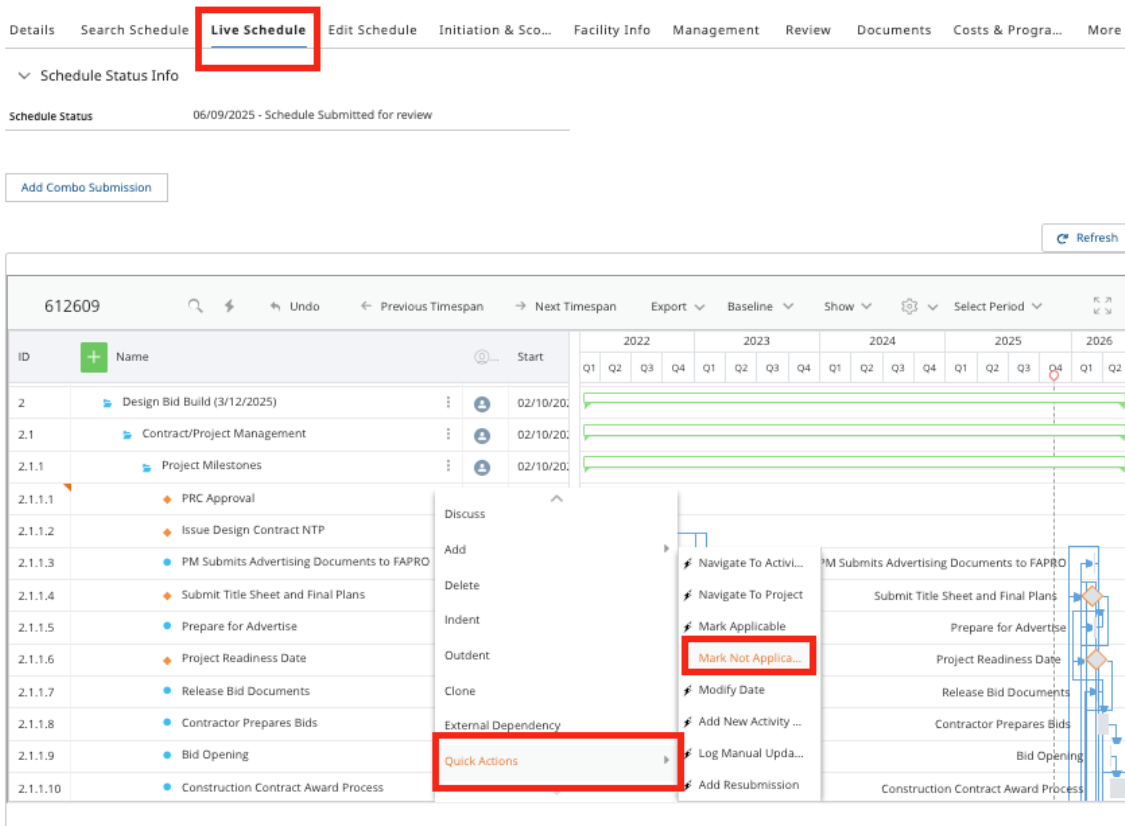
Prerequisite: ProjectInfo System Admin/Project Manager has been given edit access to the **Live Schedule** to the External Designer.

To mark a Parent Activity Group as not Applicable, follow the steps below:

3. Go to the **Live Schedule** and select any **Activity Group** and click on 3 dots.
4. Click the **Quick Actions** and select **'Mark Not Applicable'**



search



4.8.3.9 Editing Dependencies

Prerequisite: Columns for **Predecessors**, **Successors** and **Sequence** are added on the **Edit Schedule**. Refer to [Viewing and Customizing the Edit Schedule](#) 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.

Activity Name	Start	End	Duration	% Done	Predecessor	Successor	Sequence
Revise and Resubmit Final RSA Report	05/01/2020	05/07/2020	7 days	0	75	80:86	76
25% Design Package	01/23/2021	11/05/2021	287 days	0			77
Prepare & Submit 25% Design Submission	01/23/2021	03/23/2021	60 days	0	58	39:44:7...	78
Send to FHWA (if PODI)	03/23/2021	03/23/2021	0 days	0	78		79
Review 25% Design Submission & Comments L...	07/08/2021	10/05/2021	90 days	0	47:59:76:7...	81	80
Prepare 25% Design Responses	10/06/2021	10/15/2021	10 days	0	39:80:199:...	82	81
Schedule & Conduct Comment Resolution Me...	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

Activity Name	Start	End	Duration	% Done	Predecessor	Successor	Sequence
Revise and Resubmit Final RSA Report	05/01/2020	05/07/2020	7 days	0	75	80:86	
25% Design Package	01/23/2021	11/05/2021	287 days	0			
Prepare & Submit 25% Design Submission	01/23/2021	03/23/2021	60 days	0	58	39:44:7...	
Send to FHWA (if PODI)	03/23/2021	03/23/2021	0 days	0	78		
Review 25% Design Submission & Comments t...	07/08/2021	10/05/2021	90 days	0	47:59:76:7...	81	
Prepare 25% Design Responses	10/06/2021	10/15/2021	10 days	0	39:80:199:...	82	
Schedule & Conduct Comment Resolution Me...	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:

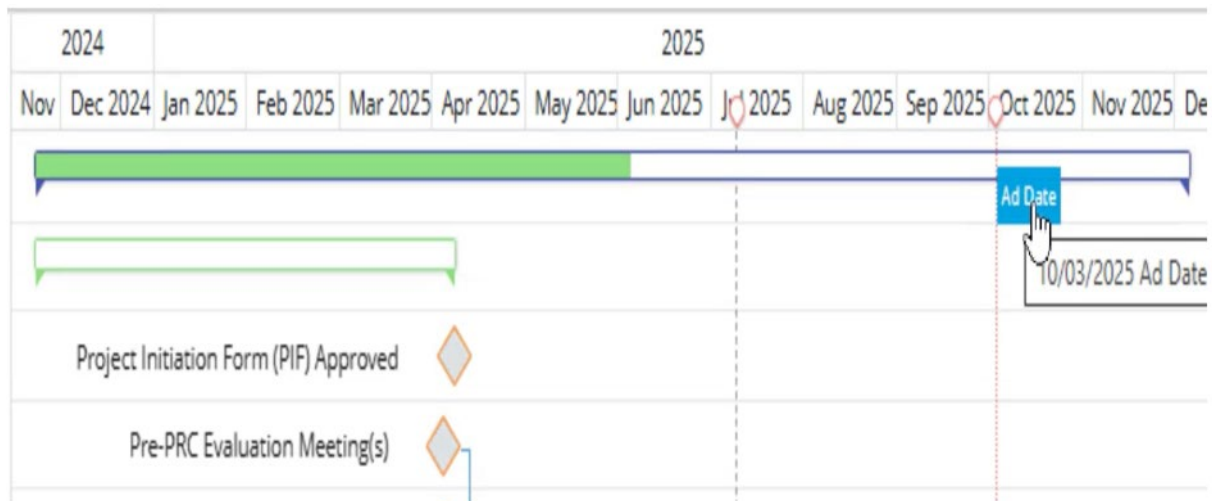
Subsurface Utility Exploration	08/17/2020	10/15/2020	60 days	0	31	80:91:86
--------------------------------	------------	------------	---------	---	----	----------

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

4.8.3.10 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 -



4.8.3.11 Reviewing Major Milestones and adjusting Durations as needed

Prerequisite: Column for **Stickers** is added on the Edit Schedule. Refer to [Viewing and Customizing the Edit Schedule](#) 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	03/20/2026	12/31/2026	287 days	68	
Prepare & Submit 25% Design Submission	03/20/2026	05/18/2026	60 days	49	69 30;35;70;71;153;184;186... M
Utility Coordination	10/12/2025	05/14/2027	580 days	74	
Schedule & Conduct Utility Early Coordinat...	01/01/2027	01/14/2027	14 days	75;73	76 77;83;80 M

Refer to [Viewing and Customizing the Edit Schedule](#) section for more details on Filtering out the Activities **By Sticker** on the Edit Schedule. To update **Activity Durations** follow the steps below:

1. 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	04/22/2021	06/13/2022	418 days
2.5.19.1	Complete Env. Assessment / Initial Inclusion of Spec. ...	04/22/2021	06/20/2021	60 days
2.5.19.2	Submit for Hazmat Review	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.

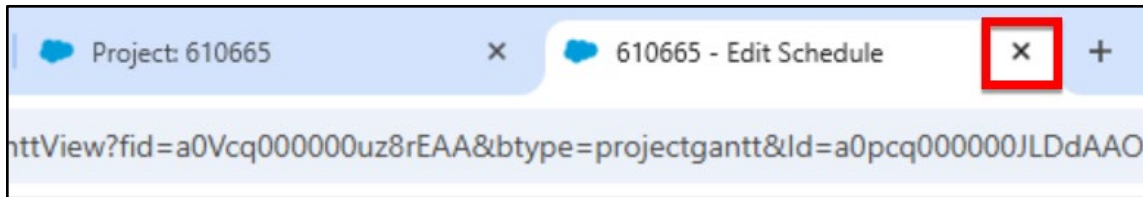
2.5.19	Hazardous Materials	04/22/2021	06/13/2022	418 days
2.5.19.1	Complete Env. Assessment / Initial Inclusion of Spec. ...	04/22/2021	06/21/2021	61 days
2.5.19.2	Submit for Hazmat Review	06/21/2021	06/21/2021	0 days

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.

4.8.4 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.



2. Click on the **Refresh** button under the **Edit Schedule** tab.
Refer to [Viewing and Customizing the Edit Schedule](#) 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.

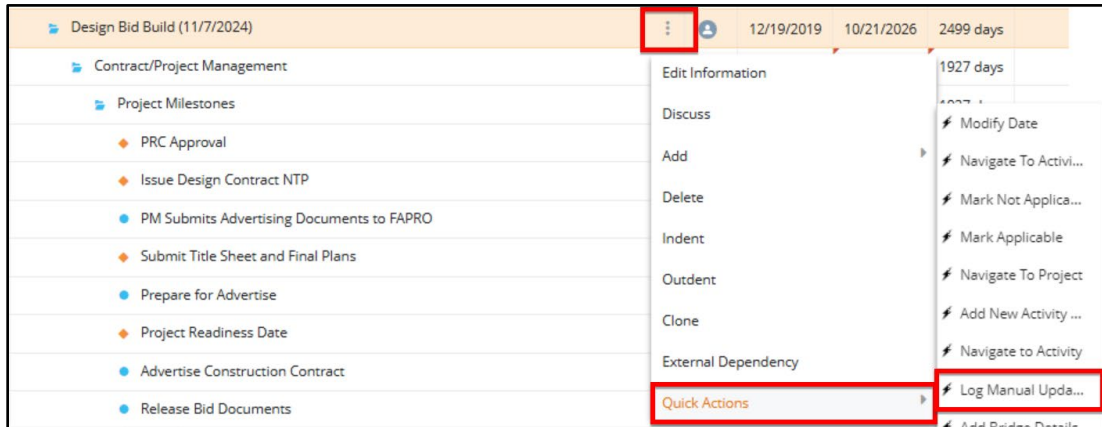
Log Manual Update the Baseline Schedule before submitting to the Project Manager.

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.

ID	Name
	610665 - Edit Schedule
1	Initiation-PRC
2	Design Bid Build (11/7/2024)
2.1	Contract/Project Management
2.1.1	Project Milestones

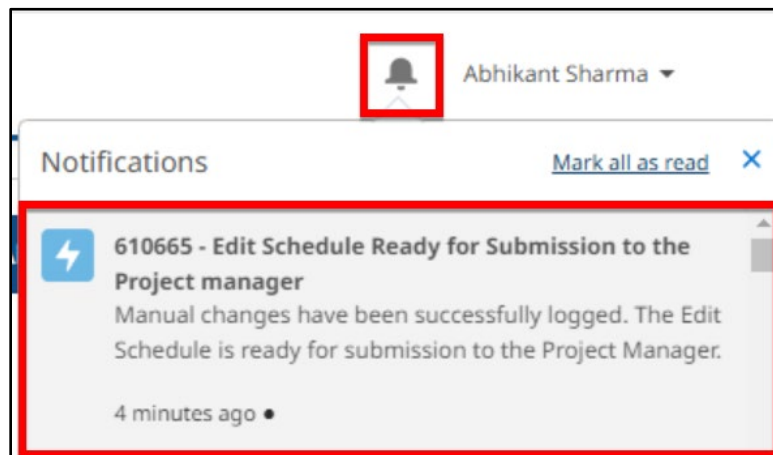
- Click on the **vertical ellipsis (three dots)** and select **Quick Actions**



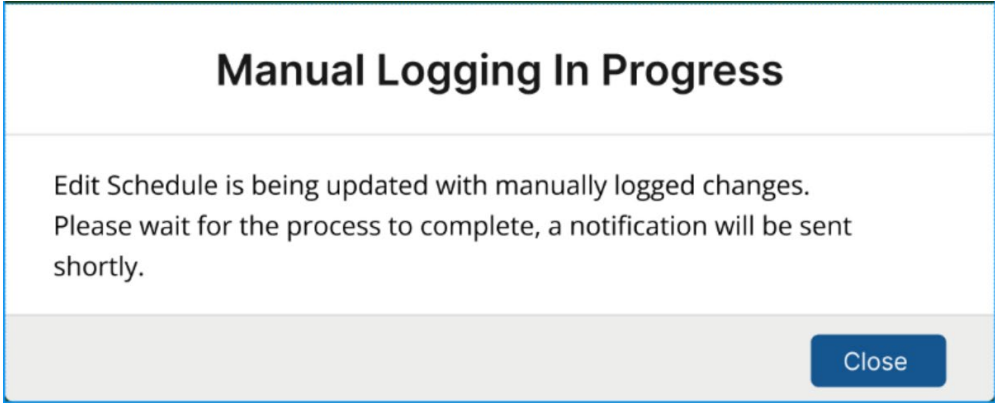
- Click on the **Log Manual Update** quick action. A blank pop-up will briefly appear and then close automatically, as shown below.



- 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**
- 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**:



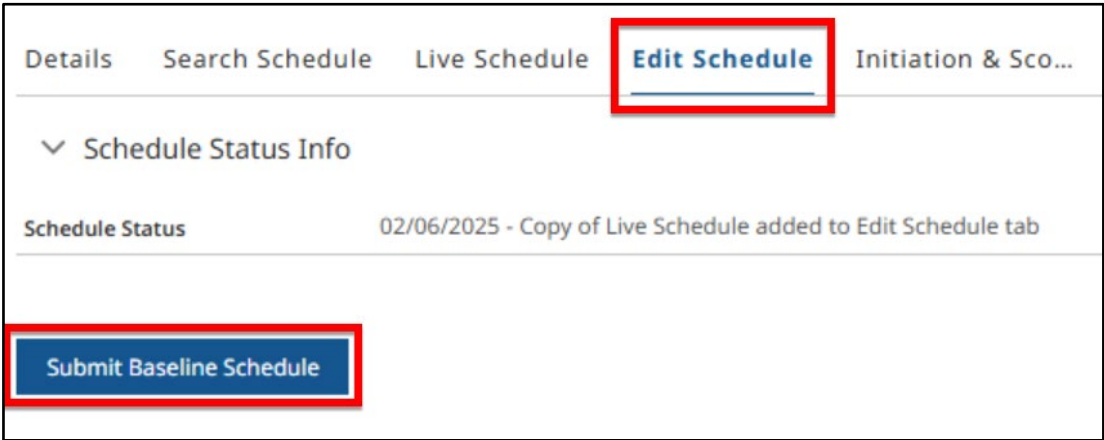
4.8.5 Submitting Baseline Schedule

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.**"

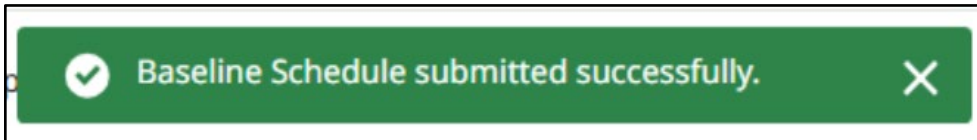
Upon completing the **Log Manual Update** process for the Baseline Schedule, the External Design Lead Contact submits the Baseline Schedule for the Project Manager’s approval.

To submit the **Baseline Schedule**:

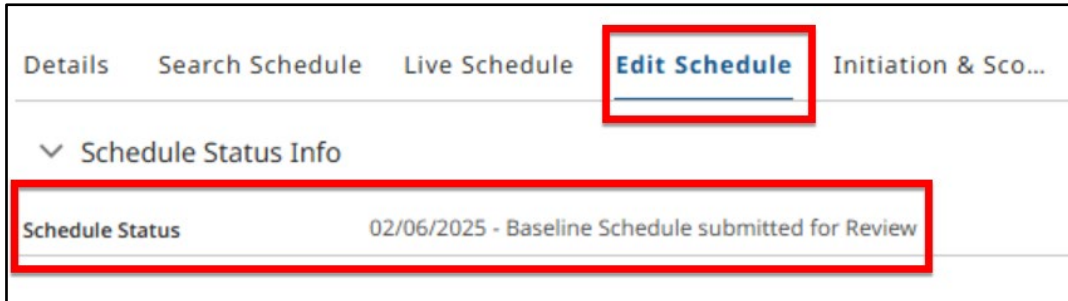
- 1. Go to the **Project**.
- 2. Go to **Edit Schedule**
- 3. Under the **Edit Schedule > Schedule Status Info** section, click **Submit Baseline Schedule**.



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



5. 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.

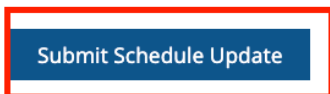
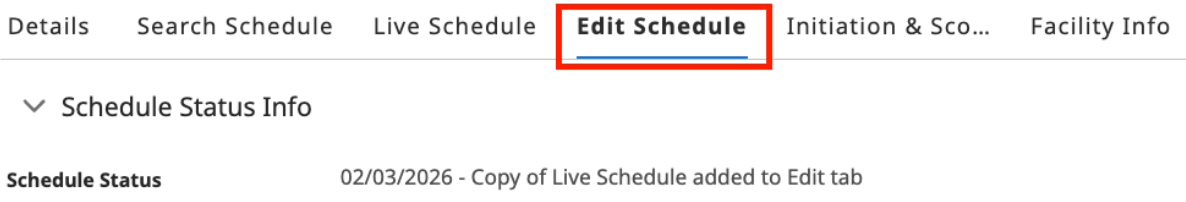


4.8.5.1 Submitting Baseline Schedule without Logging

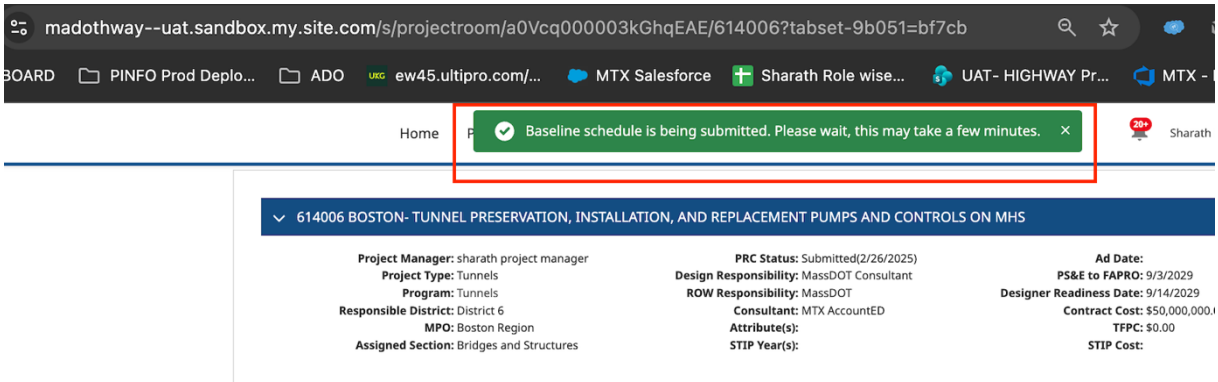
Ability for External Design Lead Contacts to Submit the Baseline Schedule without Logging as a Manual Update.

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**.



4. A Green Success Message is displayed saying **Baseline Schedule is being submitted. Please wait, this may take a few minutes. Message will be displayed**

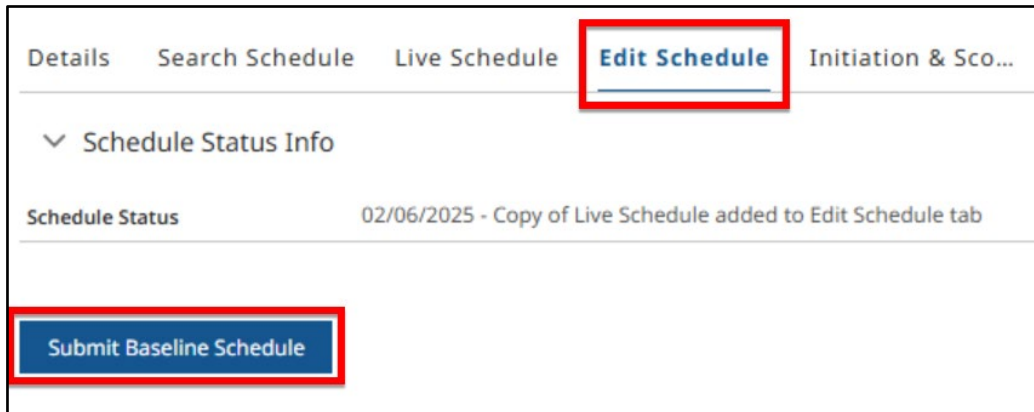


4.8.5.2 Discrepancies Screen in the Edit Schedule

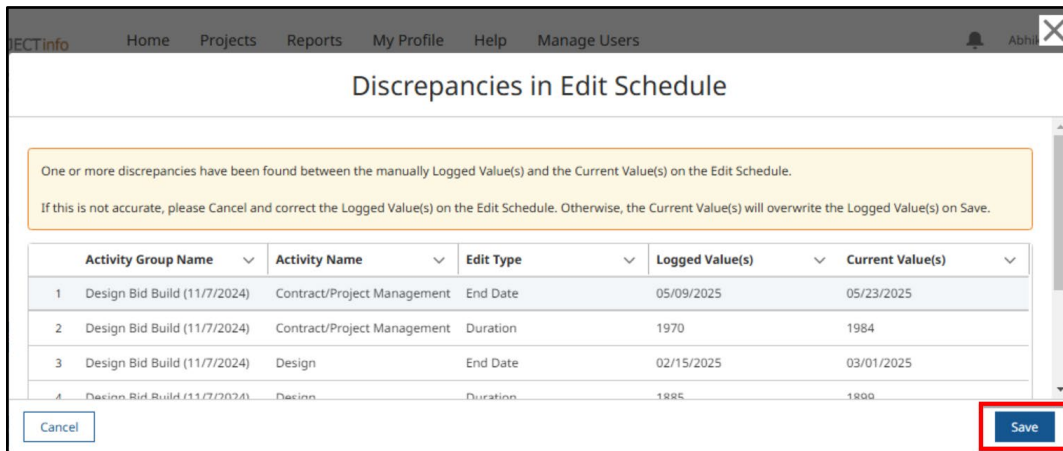
Discrepancies in the Edit Schedule screen may be displayed while Submitting the Baseline Schedule, when there are some additional changes made on the Edit Schedule after the **Log Manual Update** is clicked.

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:

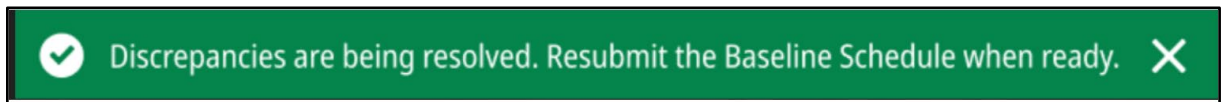
1. Go to the **Project**.
2. Go to the **Edit Schedule**.
3. Under the **Edit Schedule > Schedule Status Info** section, click **Submit Baseline Schedule**.



4. Click on **Save**.



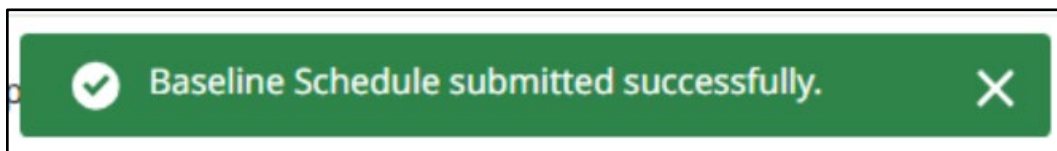
5. A green success message is displayed stating '**Discrepancies are being resolved. Resubmit the Baseline Schedule when ready**'.



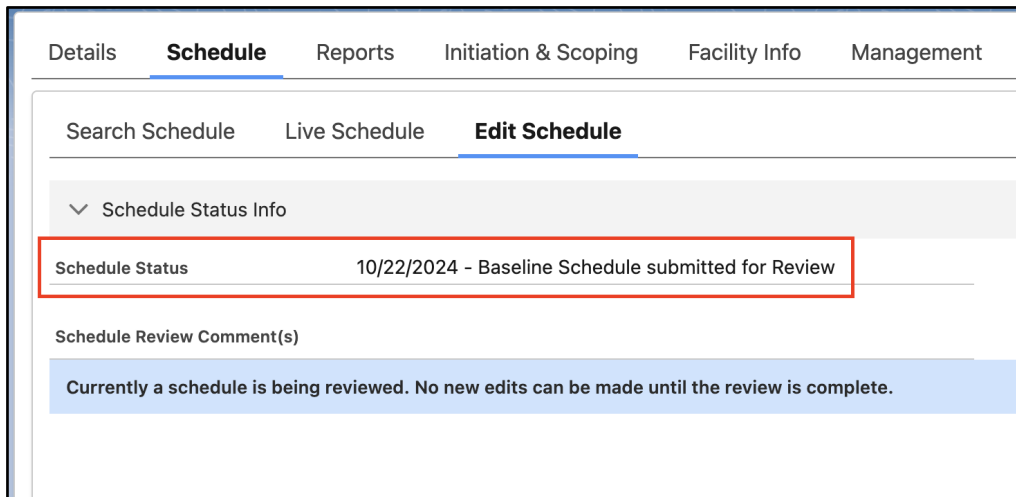
In case of **Monthly Schedule Update**, the message states '**Discrepancies are being resolved. Resubmit the Schedule when ready**'.



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**'.



8. 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.



4.8.6 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:

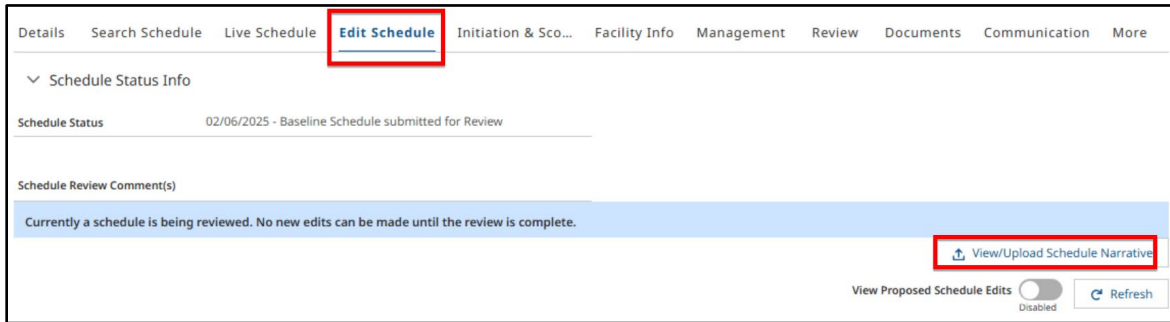
- All the Activities Completed before the ProjectInfo Baseline Submission, that have been Manually Scheduled
- **Status** of each major deliverable
- Issues and proposed solutions
- Significant **Meetings and Events**
- Outstanding issues and critical actions required by the Designer, MassDOT or third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

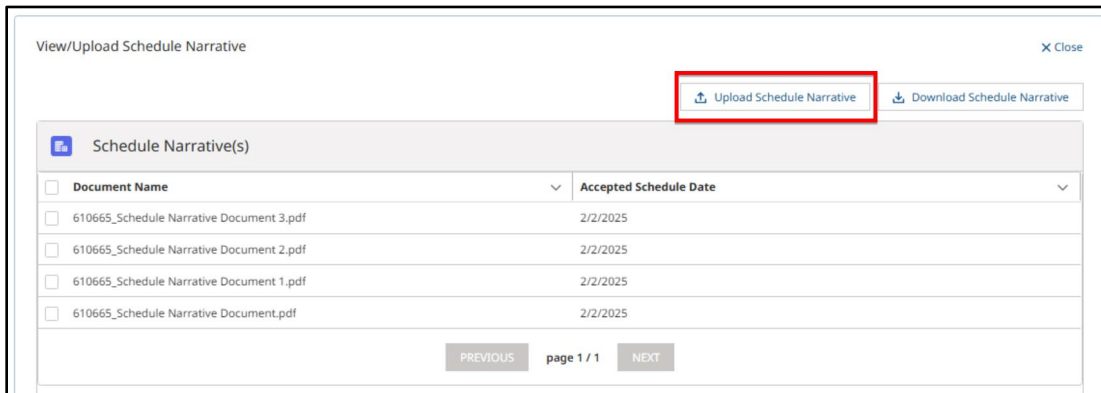
This document ensures that the **Project Manager** understands the rationale behind the adjustments and can plan accordingly.

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**

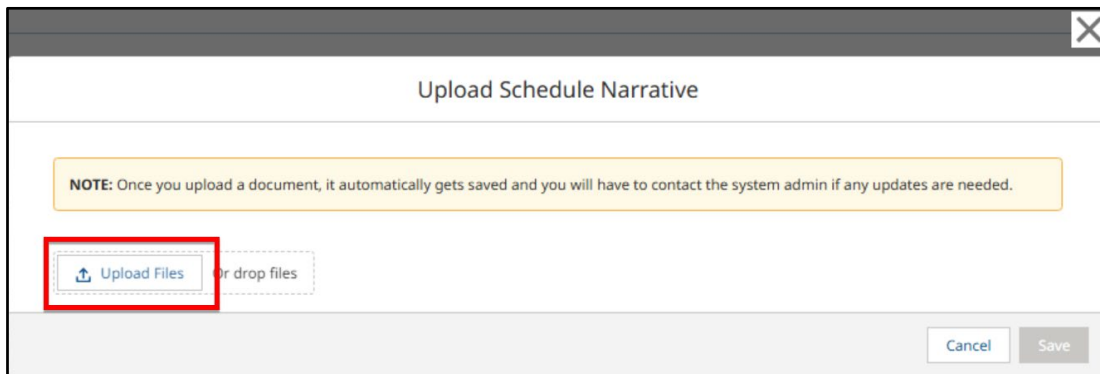


4. The user is directed to a **View/Upload Schedule Narrative** section.
5. Click the **Upload Schedule Narrative** button.

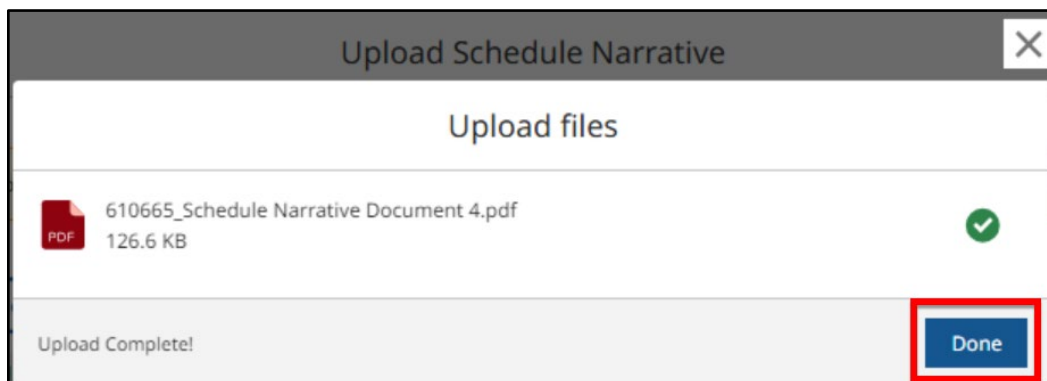


An **Upload Schedule Narrative** pop-up displays.

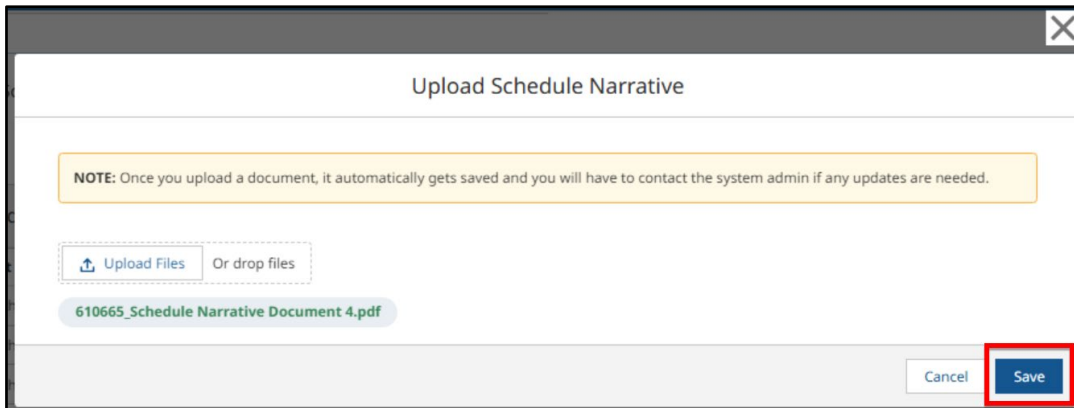
6. Click the **Upload Files** button or **drop files** to upload the required document(s).



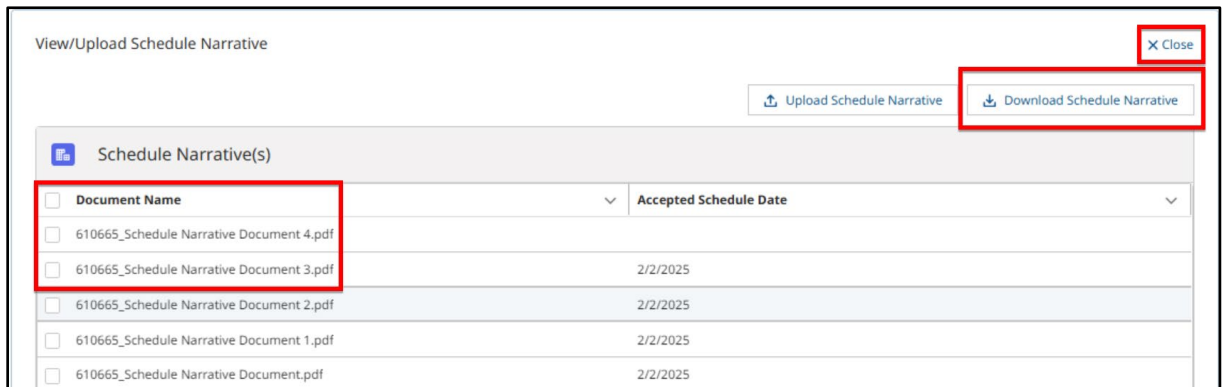
7. Click **Done**



8. Click **Save**.



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.

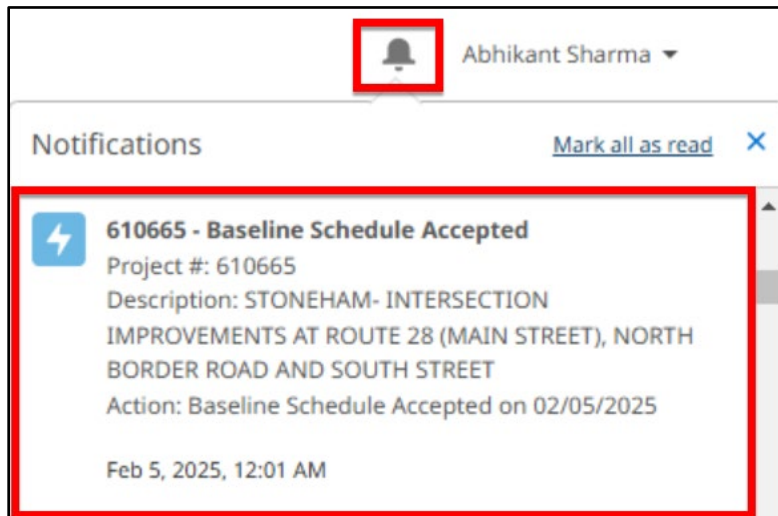


Note: Instead of uploading a **Schedule Narrative**, the External Design Lead Contact can also update the Project Manager using **Chatter** located on the Home Tab. Refer to the [Chatter](#) section for more details.

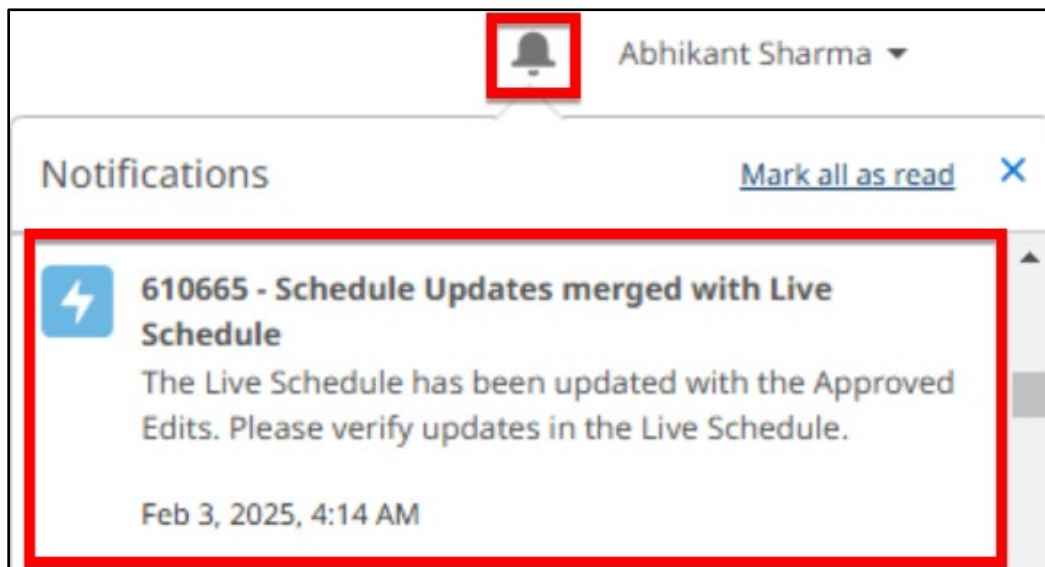
4.9 Baseline Schedule Accepted or Sent Back for Revision

4.9.1 Baseline Schedule Accepted

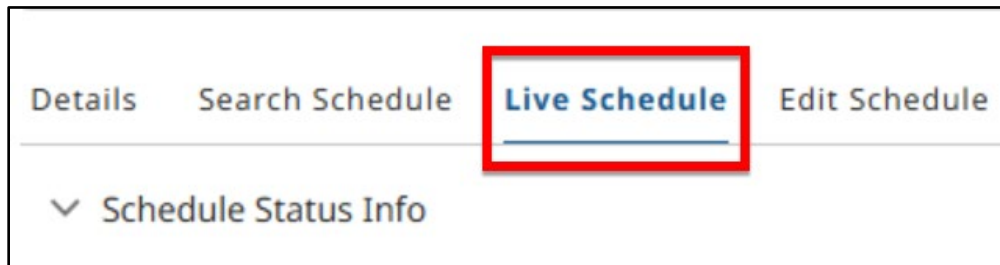
If the proposed Baseline Schedule is satisfactory, the Project Manager accepts the Baseline Schedule. The Design Lead Contact receives a Bell Notification and an Email notifying them of the Acceptance saying **Baseline Schedule Accepted**.



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.**"



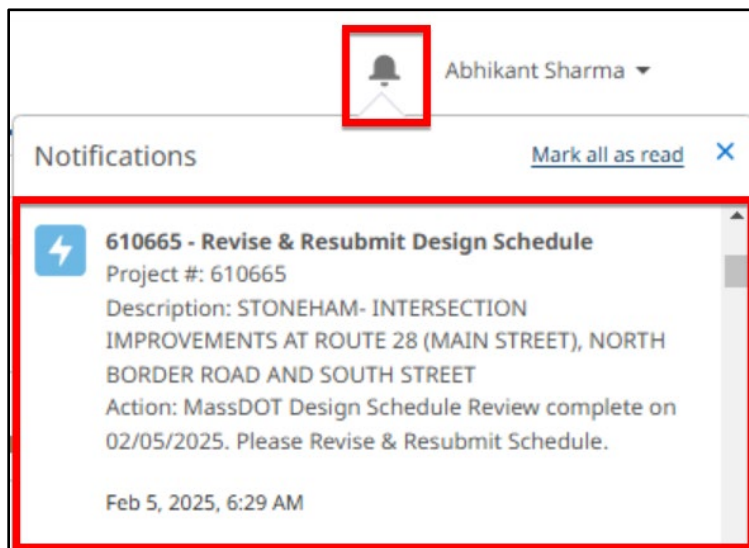
Upon receiving the notification, the External **Design Lead Contact** should navigate to the **Live Schedule** to verify that the **Baseline Schedule Updates** have been accurately merged under the **Live Schedule** tab.



4.9.2 Baseline Schedule Sent Back for Revision

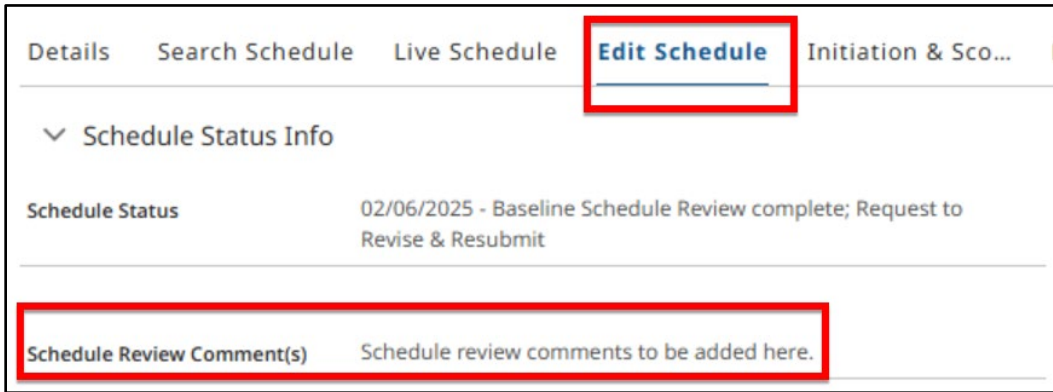
If the proposed Baseline Schedule is unsatisfactory, the Project Manager can send the Baseline Schedule back to **Revise and Resubmit** the Proposed Edits.

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.

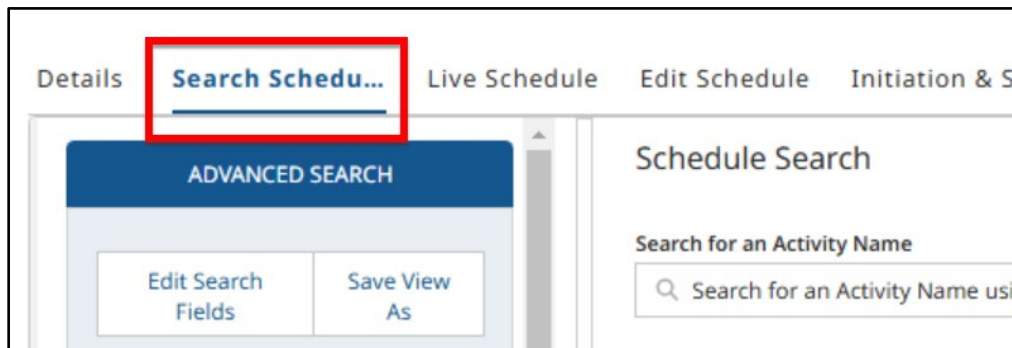


4. The Design Lead Contact can collaborate with the Project Manager using **Chatter** as well if needed. Refer to the [Chatter](#) section for more details on using Chatter.
5. The **Design Lead Contact** can update the **Edit Schedule** submitted based on the **Schedule Review Comments** received from 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.

4.10 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.

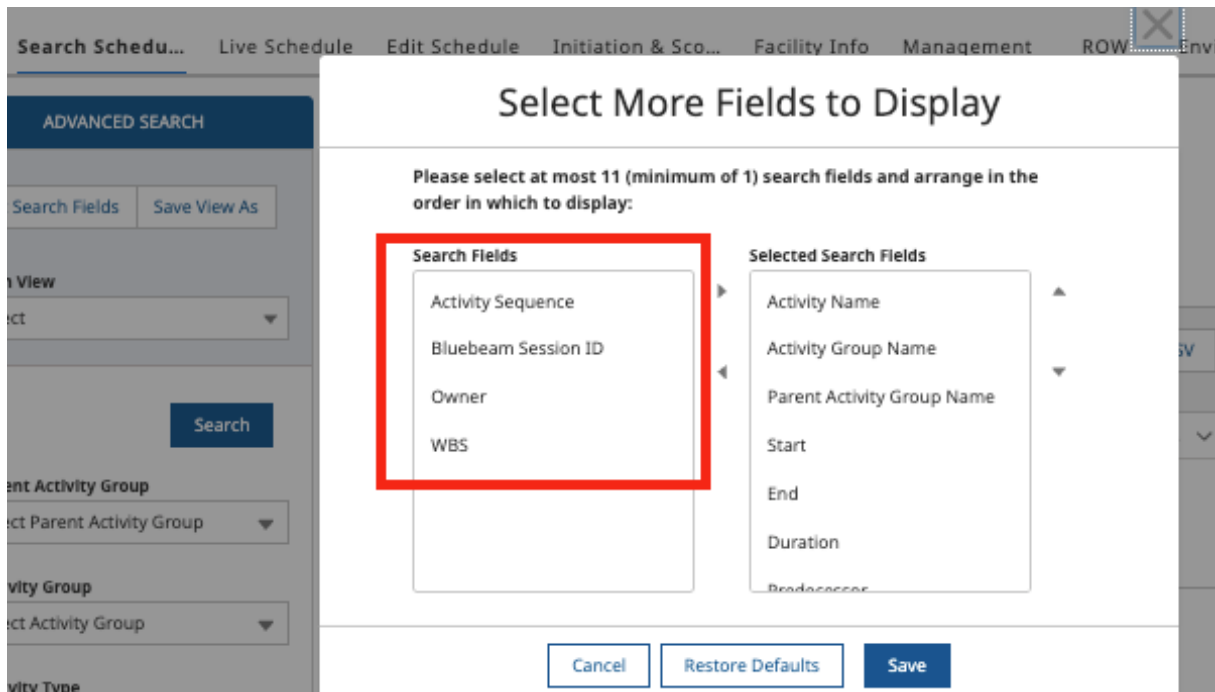
Go to the **Project > Search Schedule**.



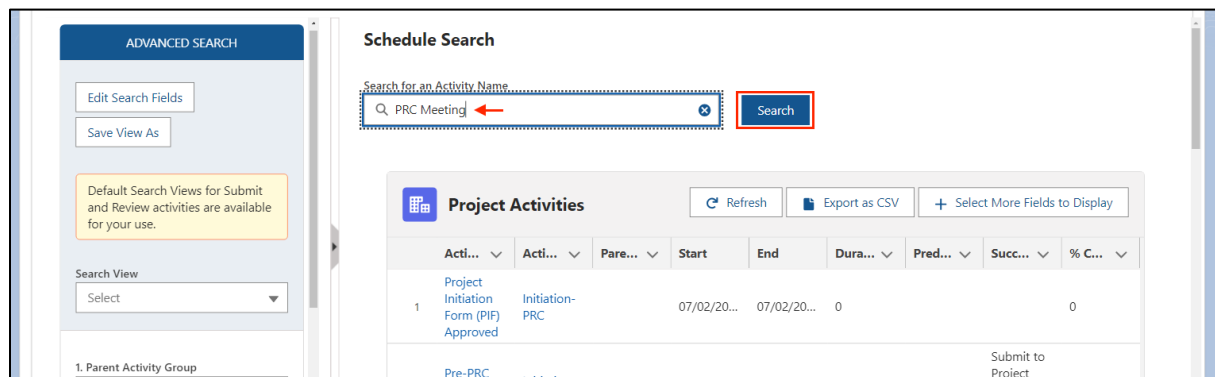
4.10.1 Basic Schedule Search

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

1. Select More Fields to Display button to add more fields.

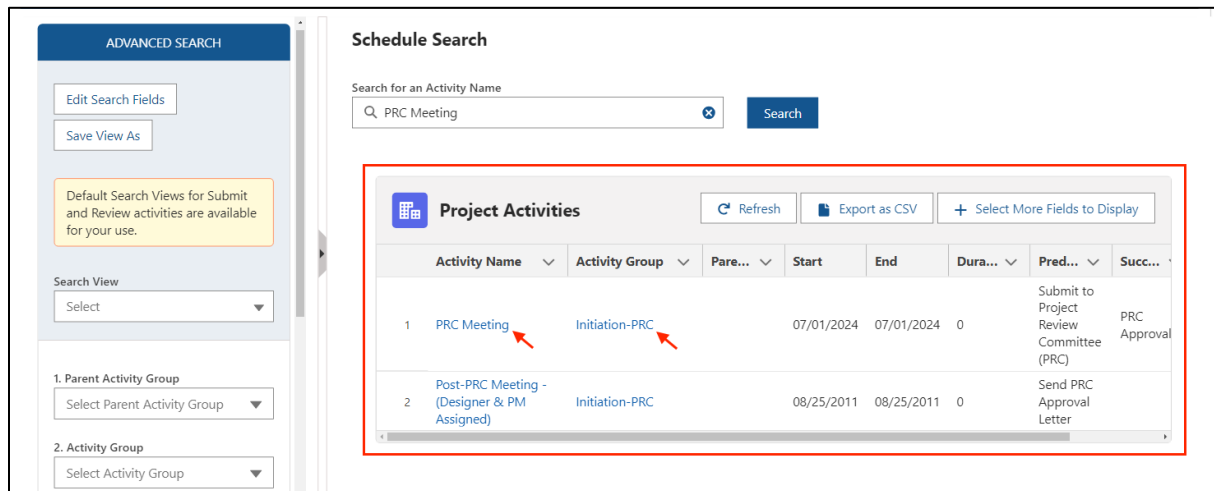


2. Enter the Activity Name in the **Search for an Activity Name** field and click the **Search** button.



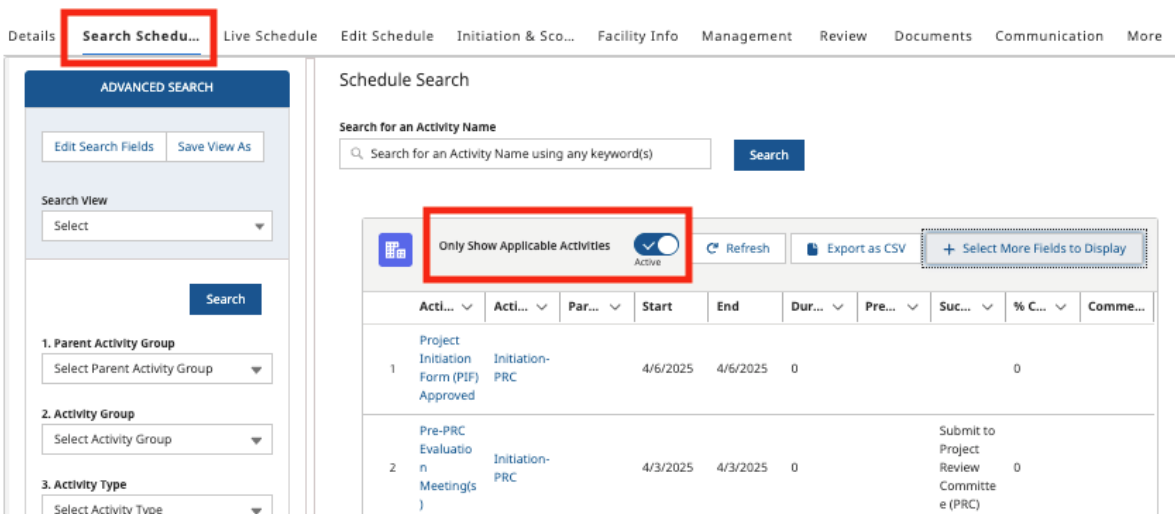
Search results will be displayed under the Projects Activities section.

2. 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.



Note: Users have the option to export multiple Project Activities related information as a CSV file and Report. Refer to [Export Project Activities as a Report](#) section.

- 3. Filtering Applicable Activities via Toggle:** Within the Schedule Search, users have access to an **Only Show Applicable Activities** toggle, which allows them to filter and view only applicable activities.



4.10.2 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

Edit Search Fields
Save View As

Default Search Views for Submit and Review activities are available for your use.

Search View

1. Parent Activity Group

2. Activity Group

3. Activity Type

4. Activity Name

5. Predecessor

Schedule Search

Search for an Activity Name

☰
Project Activities

Refresh
Export as CSV
+ Select More Fields to Display

Activity Name	Activity Group	Parent...	Start	End	Durati...	Predec...	Succes...	% Co...
1 PRC Meeting	Initiation-PRC		07/01/2024	07/01/2024	0	Submit to Project Review Committee (PRC)	PRC Approval	0
2 Post-PRC Meeting - (Designer & PM Assigned)	Initiation-PRC		08/25/2011	08/25/2011	0	Send PRC Approval Letter		0

Some of the examples are:

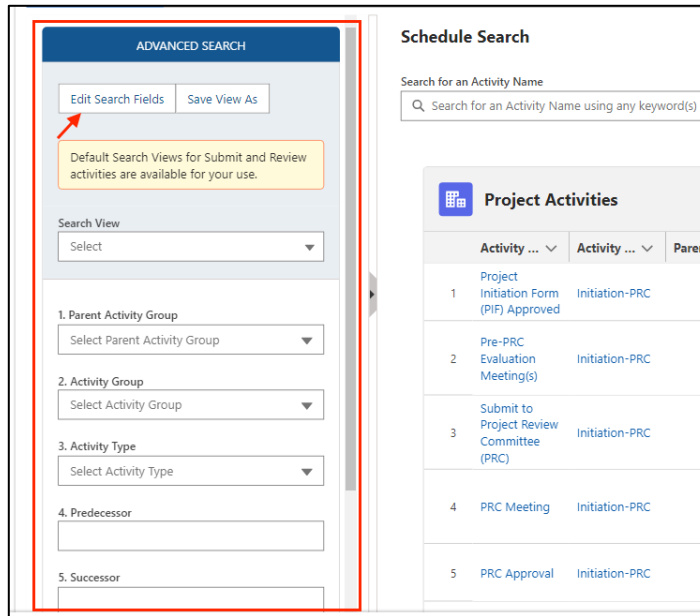
- Users can select one or more **Parent Activity Groups** from the dropdown options.

The screenshot shows the 'ADVANCED SEARCH' panel on the left and the 'Schedule Search' panel on the right. In the 'ADVANCED SEARCH' panel, the '1. Parent Activity Group' dropdown menu is highlighted with a red box. The dropdown menu is open, showing 'Select Parent Activity Group' and two selected items: 'Design' and 'Environmental'. Below this, there are other search criteria: '2. Activity Group', '3. Activity Type', '4. Activity Name', and '5. Predecessor'. The 'Schedule Search' panel on the right has a search input field and a list of results under the heading 'Project' and 'Activity Name'. The results list includes '1 PRC Meeting' and '2 Post-PRC Meeting (Designer & Assigned)'.

- Users can enter the desired Activity Name in the **Activity Name** field.

The screenshot shows the 'ADVANCED SEARCH' panel on the left and the 'Schedule Search' panel on the right. In the 'ADVANCED SEARCH' panel, the '4. Activity Name' field is highlighted with a red box. The field contains the text 'PRC Meeting' and a red arrow points to it. Below this, there are other search criteria: '5. Predecessor', '6. Successor', '7. Owner', and '8. Activity Sequence'. At the bottom of the 'ADVANCED SEARCH' panel, there are buttons for 'Add Filter Logic', 'Reset', and 'Search'. The 'Schedule Search' panel on the right has a search input field and a list of results under the heading 'Project Act' and 'Activity Name'. The results list includes '1 PRC Meeting' and '2 Post-PRC Meeting (Designer & PM Assigned)'.

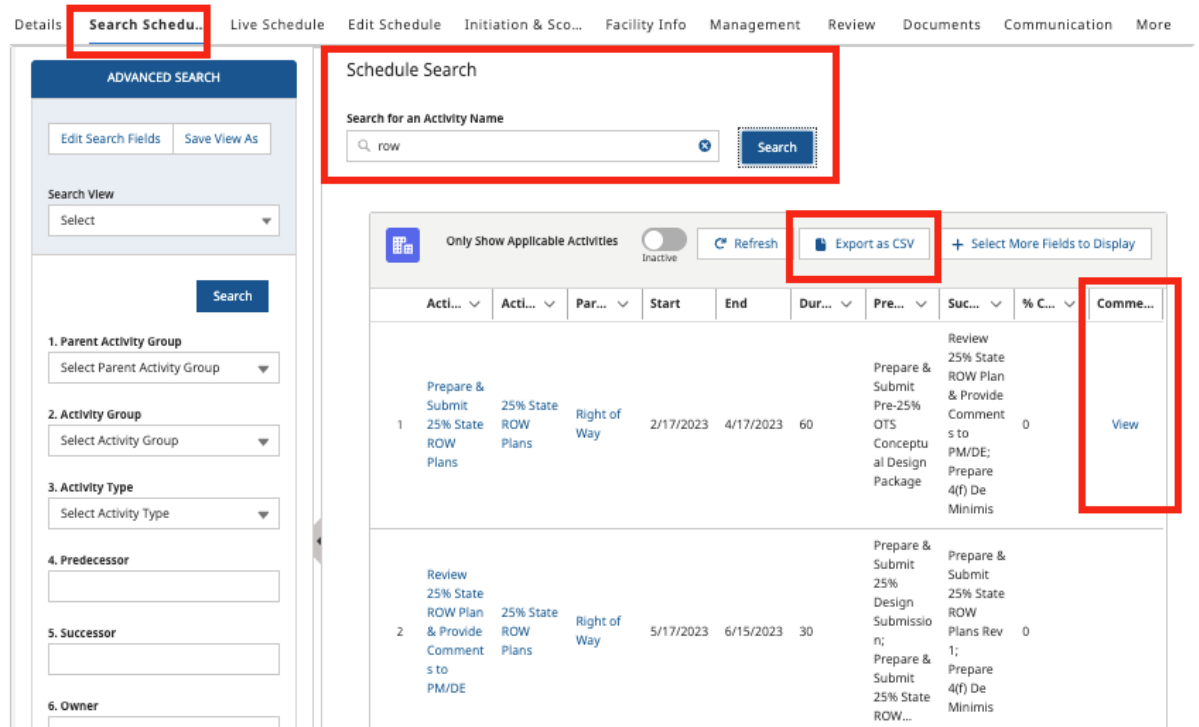
To adjust the Advanced Search fields, users can proceed by clicking the **Edit Search Fields** button on the left panel.



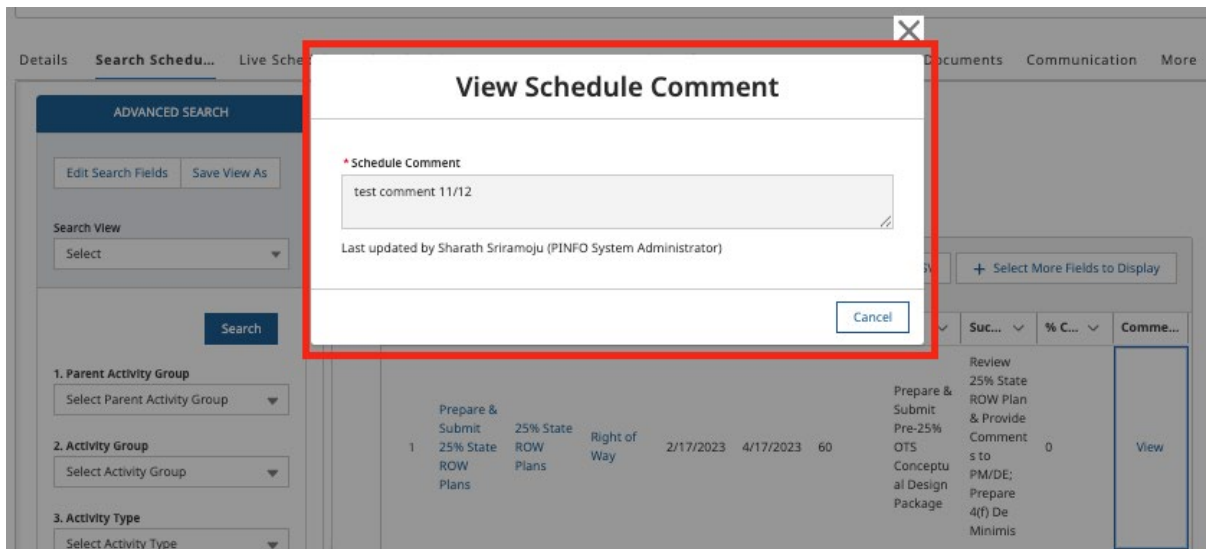
Viewing Schedule Comments in ProjectInfo

The External Designer can view comments added by the user. To do so, follow the steps below:

1. Go to the **Project > Search Schedule**
2. Locate the **Activity** for which the comment is to be viewed
3. Under the **Comment** column, click on the **View** hyperlink



4. A **View Schedule Comment** pop-up is displayed, showing the schedule comment, the individual who made the update, and a **Cancel** button.

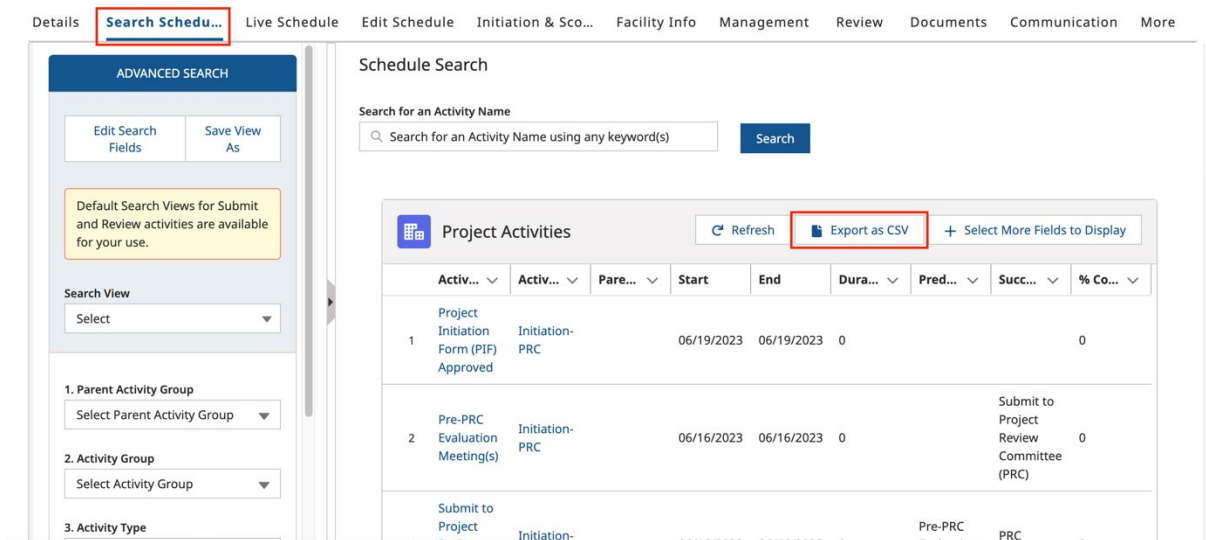


Note: You can also click on the **Export as CSV** button which will export all the Activities and any associated comments

4.10.4 Export Project Activities as a Report

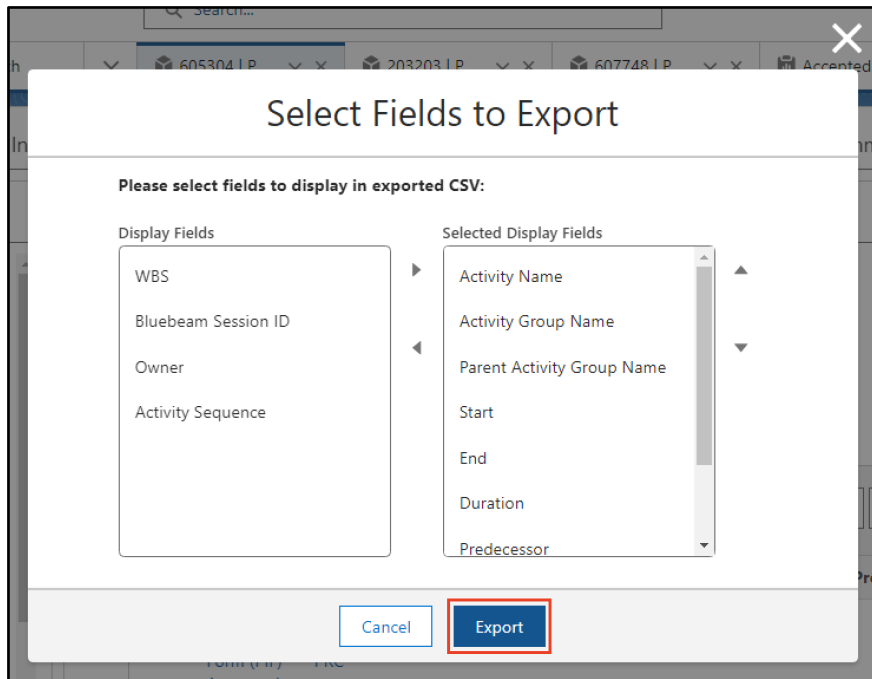
To export all the project activities on a Schedule as a report, follow the instructions below:

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



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

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



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.

Activity Name	Activity Group	Parent Activity Group Name	Start	End	Duration	Predecessor	Successor	% Complete
Project Initiation Form (PIF) Approved	Initiation-PRC		7/2/2024	7/2/2024	0		Submit to	0
Pre-PRC Evaluation Meeting(s)	Initiation-PRC		7/1/2024	7/1/2024	0		Pre-PRC E-PRC Meeti	3
Submit to Project Review Committee (PRC)	Initiation-PRC		7/1/2024	7/1/2024	0		Submit to PRC Apprc	0
PRC Meeting	Initiation-PRC		8/11/2011	8/11/2011	0		PRC Meeti Send PRC	100
PRC Approval	Initiation-PRC		8/18/2011	8/18/2011	0		PRC Apprc Post-PRC I	100
Send PRC Approval Letter	Initiation-PRC		8/25/2011	8/25/2011	0		Send PRC Approval L	0
Post-PRC Meeting - (Designer & PM Assigned)	Initiation-PRC		3/22/2027	4/2/2027	10			0
Now Permit Test			8/11/2011	8/11/2011	0		Submit	100
PRC Approval	Project Milestones	Contract/Project Management	12/23/2011	12/23/2011	0		Review an Conduct	0
Issue Design Contract NTP	Project Milestones	Contract/Project Management	11/2/2028	11/2/2028	0		Submit	0
PM Submits Advertising Documents to FAPRO	Project Milestones	Contract/Project Management	11/2/2028	11/2/2028	0		PM	0
Submit Title Sheet and Final Plans	Project Milestones	Contract/Project Management	11/2/2028	11/2/2028	0		Project Re	0
Prepare for Advertise	Project Milestones	Contract/Project Management	11/17/2028	11/17/2028	11		PM	0
Project Readiness Date	Project Milestones	Contract/Project Management	11/17/2028	11/17/2028	0		Submit	0
Advertise Construction Contract	Project Milestones	Contract/Project Management	11/20/2028	11/20/2028	1		Prepare	0
Release Bid Documents	Project Milestones	Contract/Project Management	11/21/2028	11/21/2028	1		Advertise	0
Contractor Prepare and Submits Bids	Project Milestones	Contract/Project Management	1/3/2029	1/3/2029	31		Release B Bid Openi	0
Bid Opening	Project Milestones	Contract/Project Management	1/4/2029	1/4/2029	1		Contracto Constructi	0
Construction Contract Award Process	Project Milestones	Contract/Project Management	1/5/2029	3/8/2029	45		Bid Openi Issue Con	0
Issue Construction Contract NTP	Project Milestones	Contract/Project Management	3/8/2029	3/8/2029	0		Construction Contra	0
Consultant Prepare and Submits Proposal	Project Development	Project Development	11/7/2011	12/3/2011	30		Project St. Review an	0
Review and Approve Consultant Proposal and Schedule	Project Development	Project Development	12/19/2011	12/23/2011	5		Consultar Issue Desi	0
Conduct and Submit Survey	Civil Survey	Design	12/26/2011	3/16/2012	60		Issue Desi Submit	0
Review Survey	Civil Survey	Design	3/19/2012	6/8/2012	60		Conduct a Approval c	0
Approval of Survey	Civil Survey	Design	6/8/2012	6/8/2012	0		Review Su Develop	0
Conduct and Submit Survey	Civil Survey.Rev1	Design	12/26/2011	3/16/2012	60			0
Review Survey	Civil Survey.Rev1	Design	3/19/2012	6/8/2012	60			0
Approval of Survey	Civil Survey.Rev1	Design	6/8/2012	6/8/2012	0			0

4.11 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 -

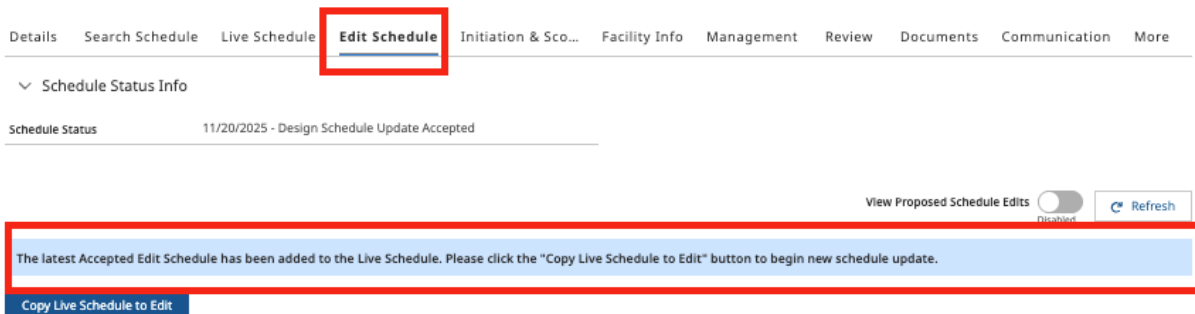


Once received, navigate to the Live Schedule for the project for which the edit access is granted to you.

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 [Copying a Live Schedule](#) section.

For proposing new Schedule Updates, users can navigate to the **Edit Schedule** page. A blue banner is displayed with the message: *"The latest accepted Edit Schedule has been added to the Live Schedule. Please click the 'Copy Live Schedule to Edit' button to begin a new schedule update."* Users can create a new editable copy by selecting the **Copy Live Schedule to Edit** button.



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.

4.11.1 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:

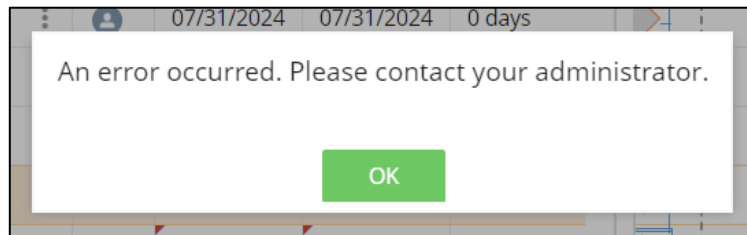
1. Activities Manually Scheduled
2. Changed End Dates and Durations
3. Activities marked as Not Applicable
4. New Activities/Activity Groups
5. Dependency Changes [If a User believes the dependencies of an activity are incorrect, they should email **Project Controls** to verify them.]

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

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:



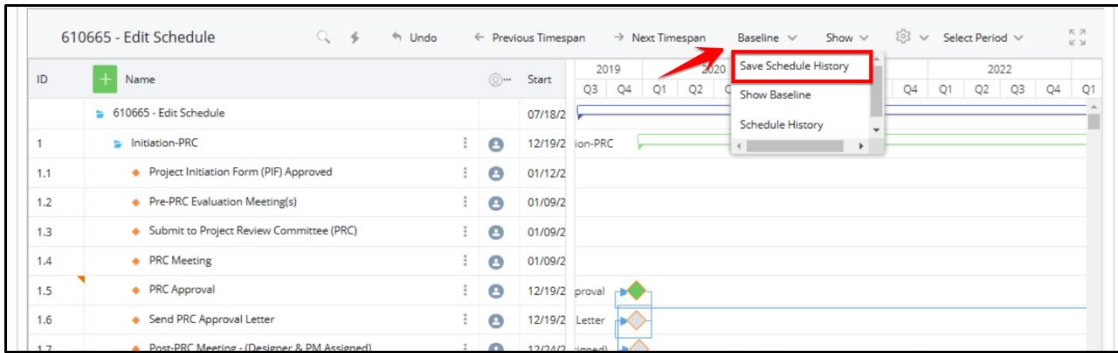
The External Design Lead Contact can make updates to existing **Activity Groups, Activities, and Milestones**, or add new **Activity Groups, Activities, or Milestones** to the **Edit Schedule**.

4.11.2 Adding a Snapshot

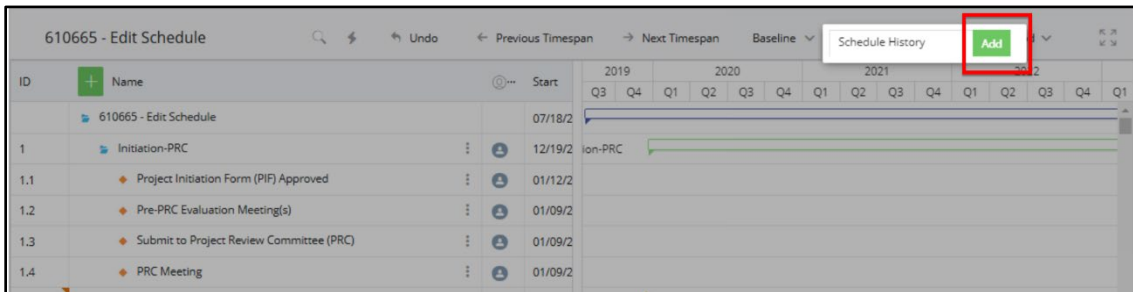
A Snapshot should be added on the Edit Schedule to check the Total Slack and Delta between the End Dates, for comparing two versions of the Edit Schedule.

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

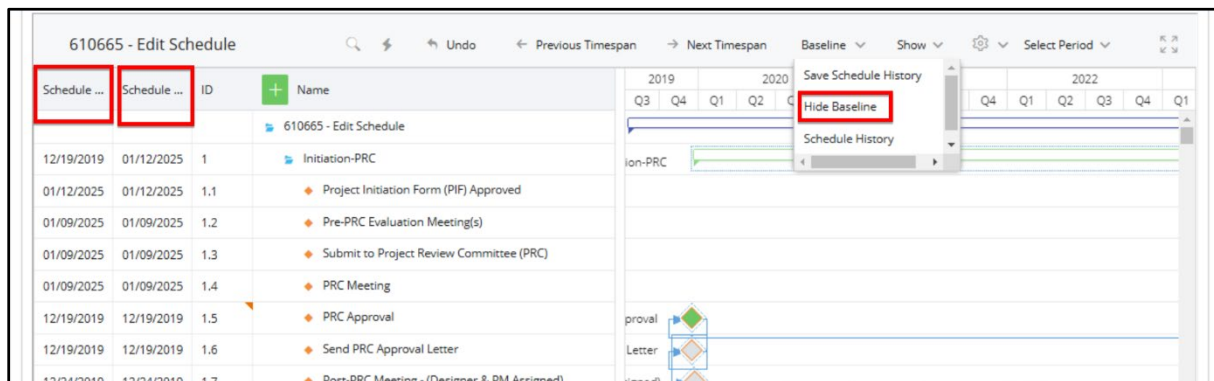
1. Go to the **Project**.
2. Go to **Schedule > Edit Schedule**.
3. Click on the **Baseline** dropdown and select the **Save Schedule History** option.



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



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.



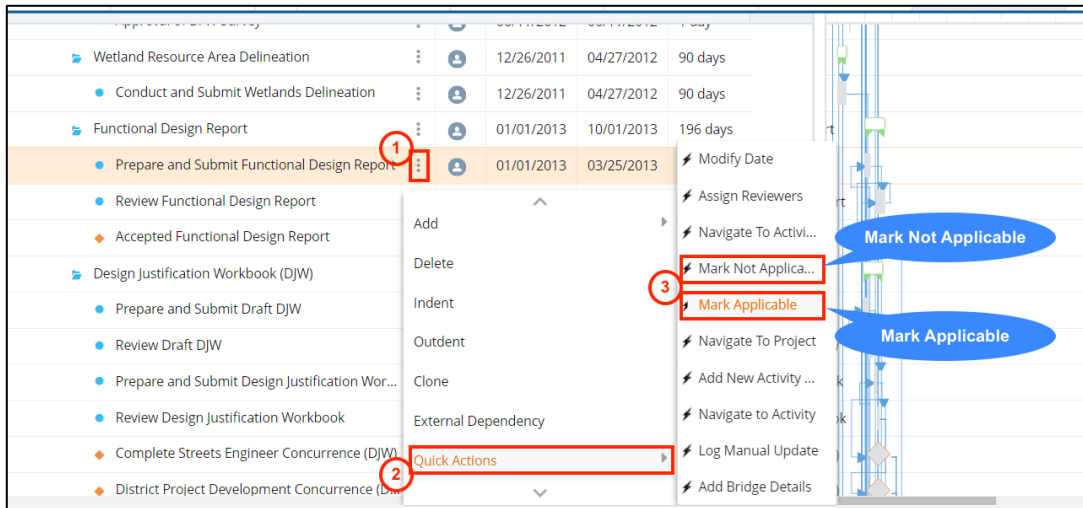
4.11.3 Marking Activities/Activity Groups as Applicable/Not Applicable

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 [Marking Activities/Activity Groups as Not Applicable](#) 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**.
2. Click the vertical ellipsis(three dots) > **Quick Actions**, and select the **Mark Applicable** Quick Action.

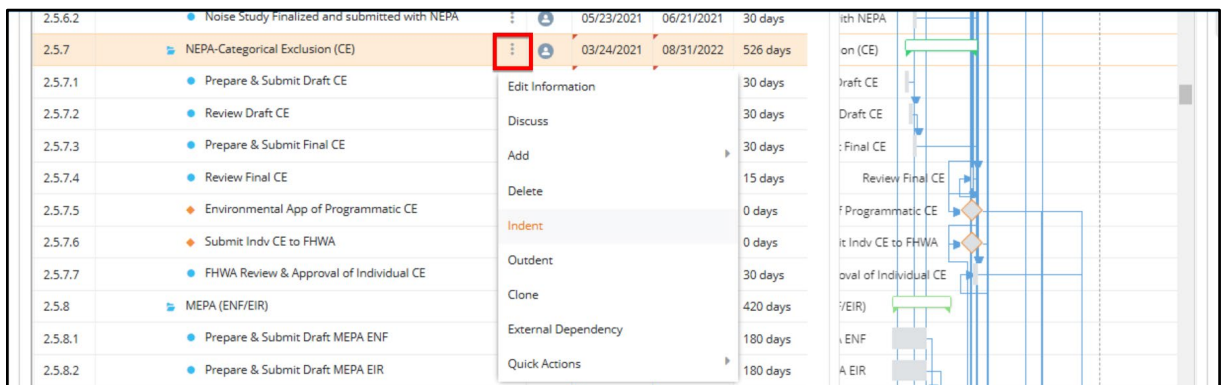


Note: When an **Activity/Activity Group** is marked as **Applicable** again, the **Not Applicable** sticker is removed. However, the **Activity Duration** and **Dependencies (Predecessors/Successors)** must be updated manually.

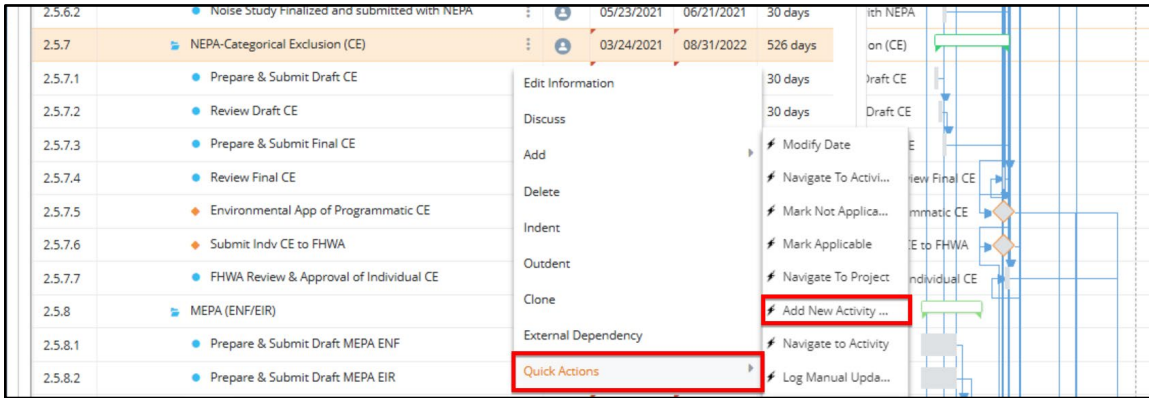
4.11.4 Adding Activity Groups

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)



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



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

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**.

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	⋮		08/22/2022	08/31/2022	10 days
2.5.8.1	Prepare New Activity Group	⋮		08/22/2022	08/31/2022	10 days
2.5.8.2	Submit New Activity Group	⋮		08/22/2022	08/31/2022	10 days
2.5.8.3	Review New Activity Group	⋮		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 [Editing Dependencies](#) 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 Date** fields.

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**.

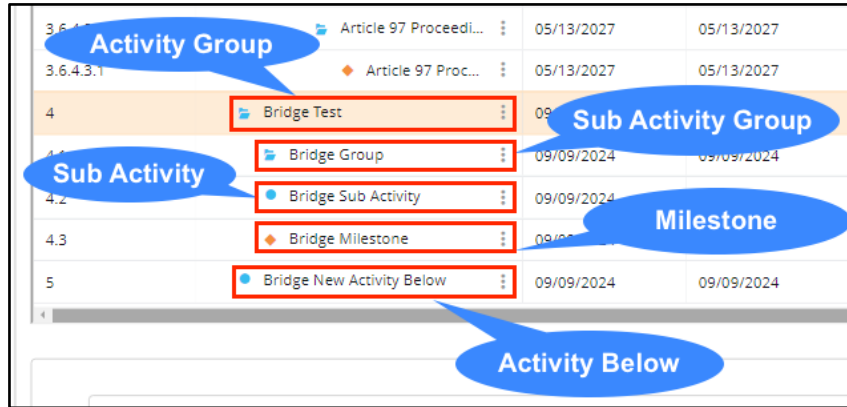
11. Locate the **Custom Fields** and update **WBS Code** and then click **Save**.

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.

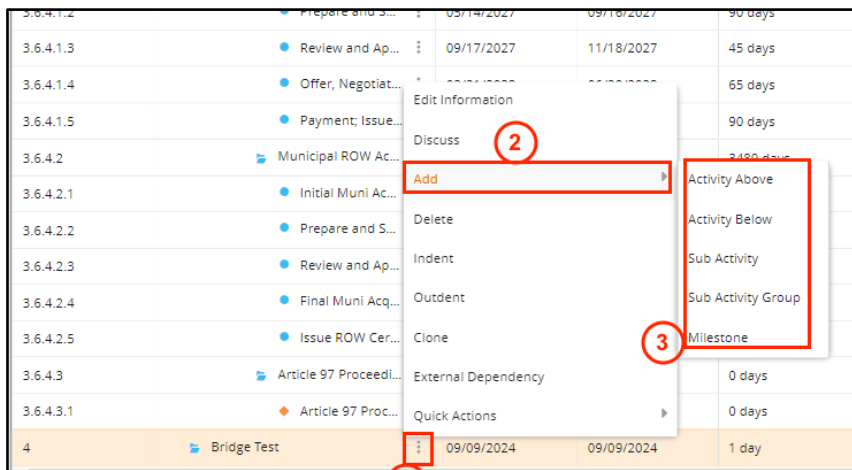
12. Similarly, update the **WBS Code** for all the Activities/Milestones under the New Activity Group.

4.11.5 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.



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



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
Subactivity	A 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.

4.11.6 Updating Activity Durations

Under the **Edit Schedule**, the Design Lead Contact can propose **Duration** changes for the Activities. Refer to the [Updating Activity Durations](#) section for more details.

4.11.7 Editing Dependencies

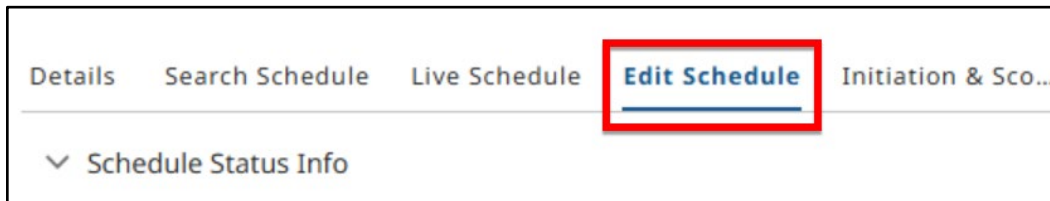
The Design Lead Contact can propose **Dependency (Predecessors/Successors)** changes under the **Edit Schedule**. Refer to the [Editing Dependencies](#) section for more details.

4.11.8 Adding Resubmission Activity Group

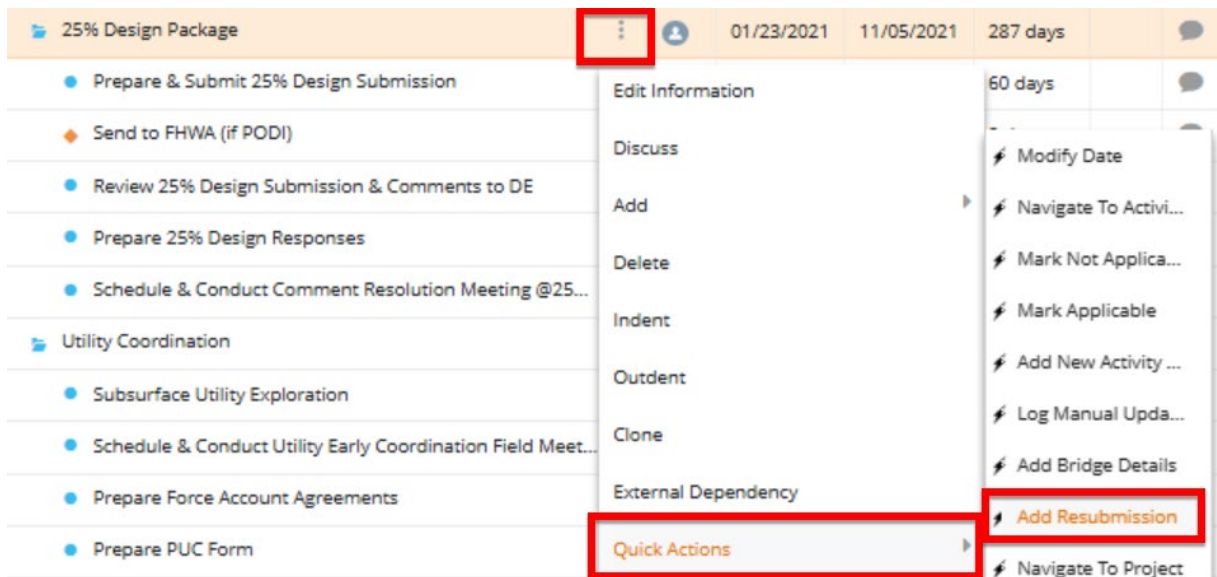
Resubmissions are primarily applicable to **Design Packages** but may not be relevant to all **Activity Groups**.

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.



5. Click on **Add**

Add New Resubmission Activity Group

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.

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

 25% Design Package	⋮
 Prepare & Submit 25% Design Submission	⋮
 Send to FHWA (if PODI)	⋮
 Review 25% Design Submission & Comments to DE	⋮
 Prepare 25% Design Responses	⋮
 Schedule & Conduct Comment Resolution Meeting @25...	⋮
 25% Design Package - Rev 1	⋮
 Prepare & Submit 25% Design Submission - Rev 1	⋮
 Send to FHWA (if PODI) - Rev 1	⋮
 Review 25% Design Submission & Comments to DE - Rev 1	⋮
 Prepare 25% Design Responses - Rev 1	⋮

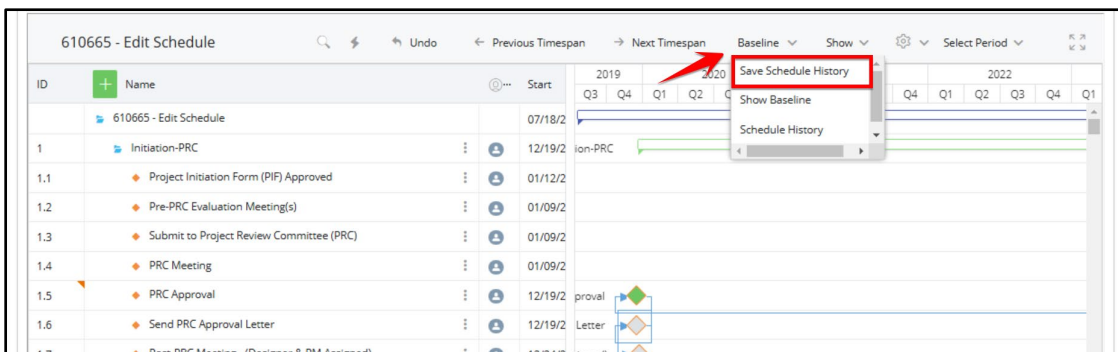
4.11.9 Reviewing Total Slack and Critical Path

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.

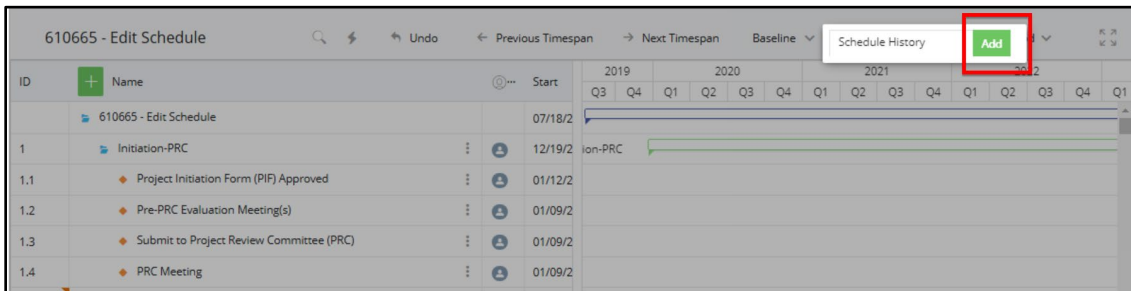
4.11.9.1 Adding a Snapshot

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

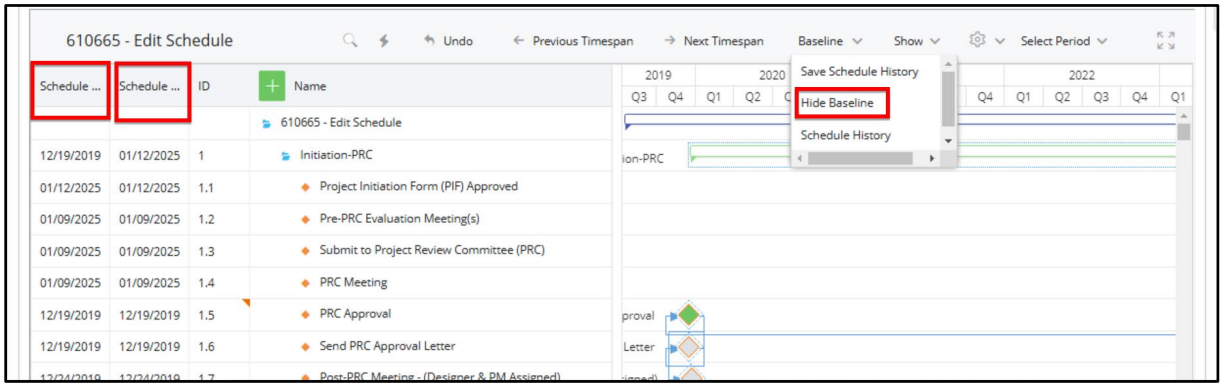
1. Go to the **Project**.
2. Go to **Schedule > Edit Schedule**.
3. Click on the **Baseline** dropdown and select the **Save Schedule History** option.



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



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.

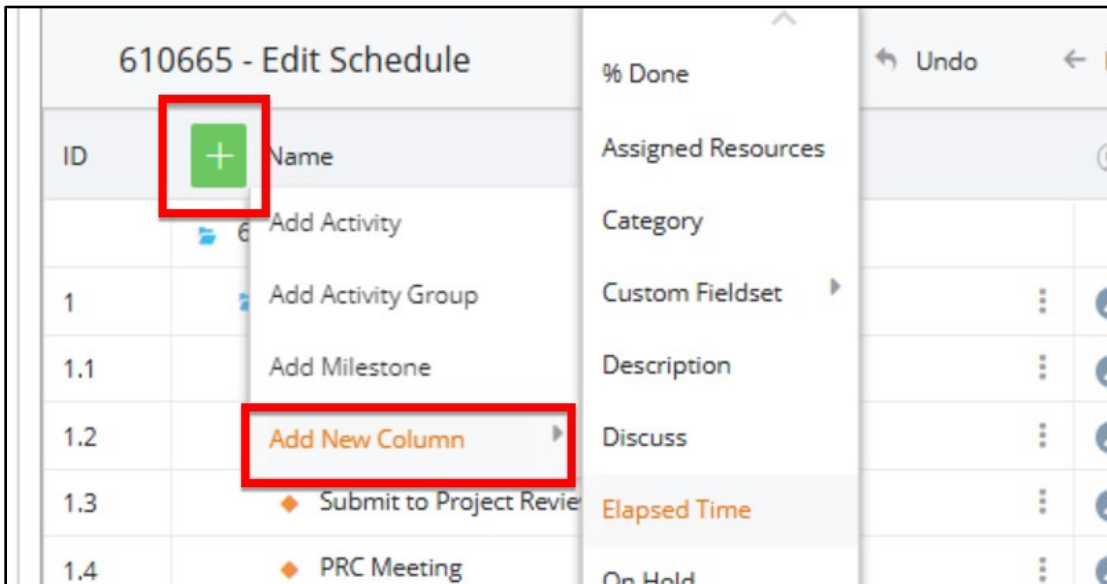


4.11.9.2 Reviewing Total Slack

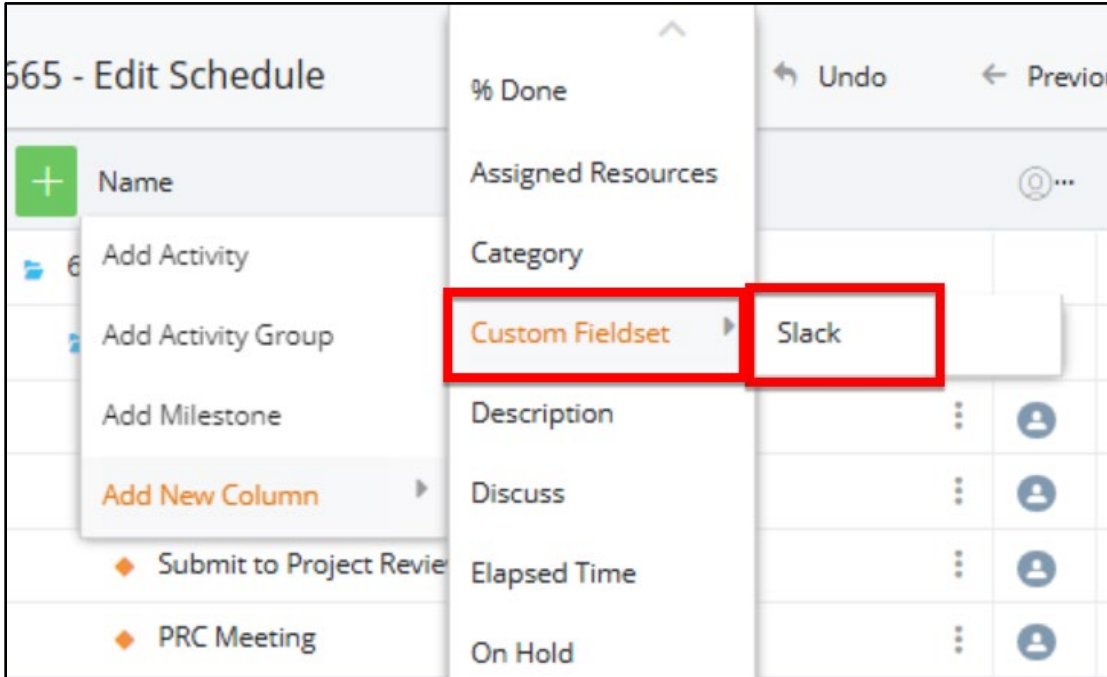
Total Slack determines the number of days a Schedule Activity can be delayed without impacting the Schedule End Date (i.e. the **Construction Contract NTP Date**).

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.



- Click on **Custom Fieldset** and select **Slack**



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

The screenshot shows the '610665 - Edit Schedule' interface with a table of activities. The table has columns for 'Name', 'Start', 'End', 'Duration', 'Total (In ...)', and 'Delta (In ...)'. The 'Total (In ...)' column is highlighted with a red box. The data in the table is as follows:

Name	Start	End	Duration	Total (In ...)	Delta (In ...)
Submit Title Sheet and Final Plans	09/30/2024	09/30/2024	0 days	651	0
Prepare for Advertise	10/01/2024	10/11/2024	11 days	651	0
Project Readiness Date	10/11/2024	10/11/2024	0 days	93	0
Advertise Construction Contract	10/12/2024	10/12/2024	1 day	93	0

- 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.

The screenshot shows the '610665 - Edit Schedule' interface with a table of activities. The table has columns for 'ID', 'Name', 'Start', 'End', 'Duration', 'Total (In ...)', and 'Delta (In ...)'. The 'Delta (In ...)' column is highlighted with a red box. The data in the table is as follows:

ID	Name	Start	End	Duration	Total (In ...)	Delta (In ...)
2.5.2.4	Review Final ERC	03/24/2021	04/22/2021	30 days	703	0
2.5.3	Historic / Archeology (Section 106) Review	03/24/2021	09/30/2021	191 days	1354	-10
2.5.3.1	Conduct Historic Impact Analysis	03/24/2021	05/02/2021	40 days	1354	-10
2.5.3.2	Perform & Submit Arch Survey	05/03/2021	07/01/2021	60 days	1354	-10
2.5.3.3	Review Arch Survey	07/02/2021	07/31/2021	30 days	1354	-10
2.5.3.4	No Effect Finding (NEF) Determined	08/01/2021	08/30/2021	30 days	1541	-10
2.5.3.5	No Adverse Effect Finding (NAE)	08/01/2021	08/30/2021	30 days	1354	-10

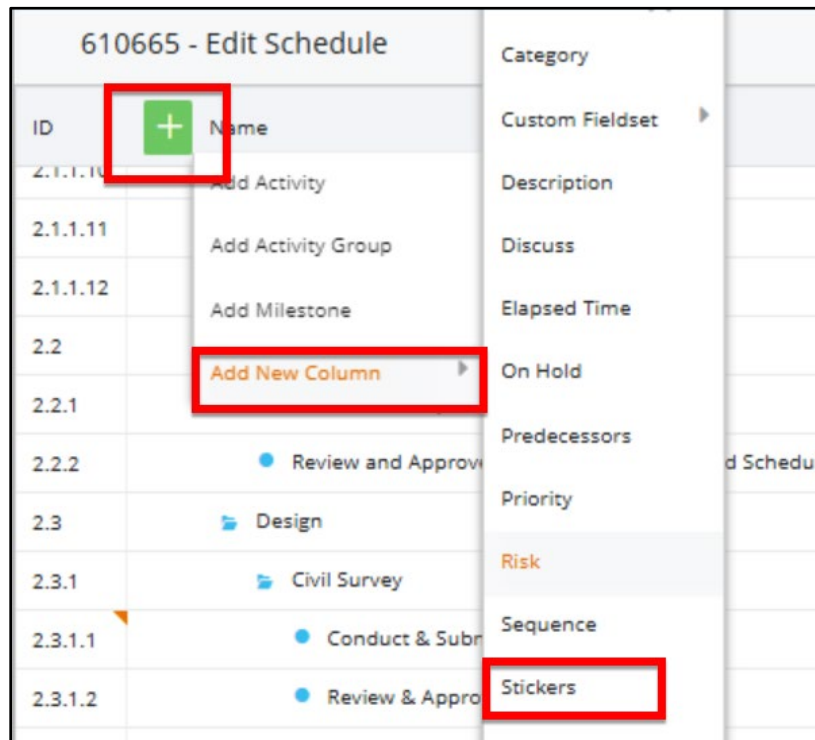
4.11.9.3 Reviewing Critical Path

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.

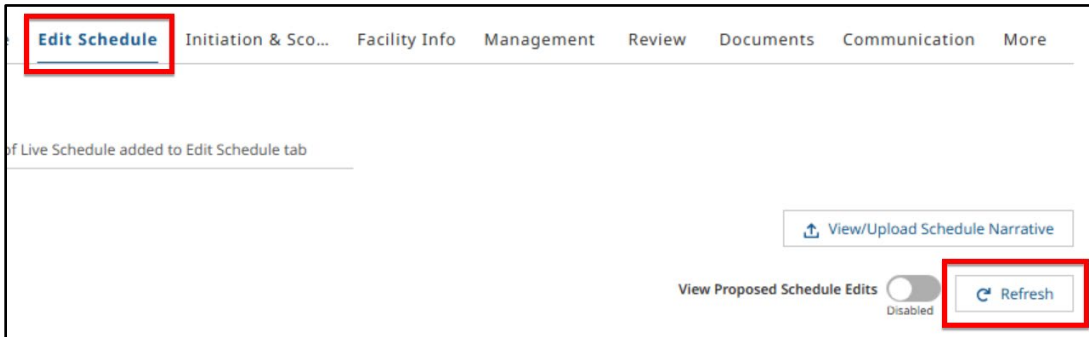
To review the Activities on the **Critical Path** on the **Edit Schedule**:

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



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

Name	Start	End	Duration	Stickers	Tot...
75% Right of Way State	10/21/2021	06/16/2022	239 days	CP MU	0
75% Right of Way State	10/21/2021	01/18/2022	90 days	CP MU	-1
Prepare & Submit 75% ROW Plans	10/21/2021	11/19/2021	30 days	MU	30
Review 75% State ROW Plan & Comm...	12/20/2021	01/18/2022	30 days	CP MU	-1
75% Right of Way State Rev 1	01/19/2022	03/19/2022	60 days	CP MU	-1
Prepare & Submit 75% ROW Plans	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 [Viewing and Customizing the Edit Schedule](#) section for more details.

4.11.9.4 Reviewing End Date Delta

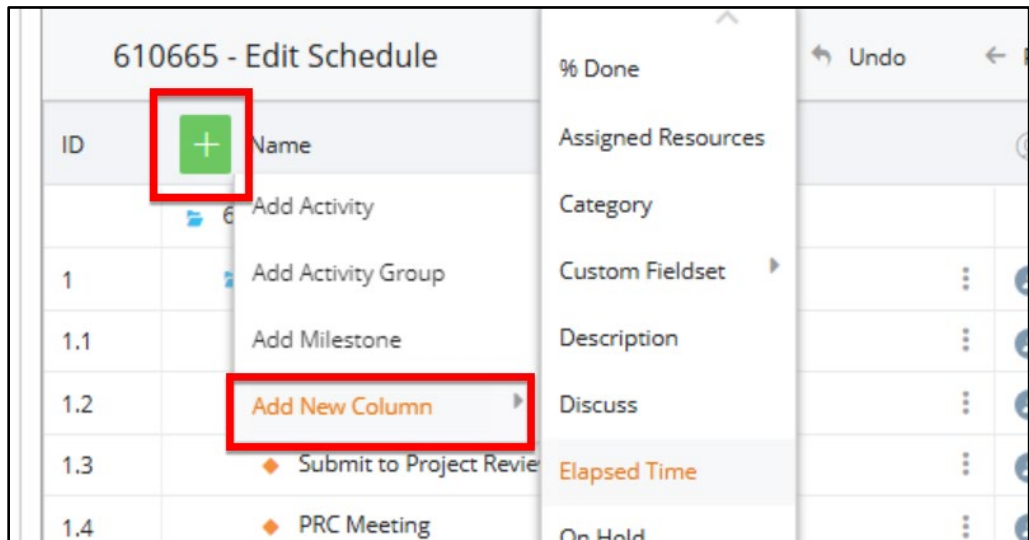
Note: Add a Snapshot on the Edit Schedule for reviewing the End Date Delta

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.

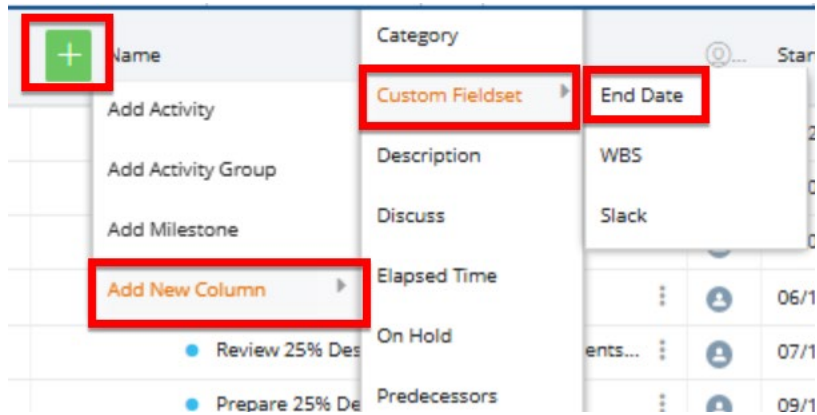
End Date Delta = (End Date of the Activity in the First Snapshot taken after creating a Copy) - (End Date of the Activity in the Latest Snapshot).

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

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



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

		Start	End	Duration	% ...	End Date Delta (In ...)
◆ Revise and Resubmit Final RSA Report		05/25/2024	05/25/2024	0 days	0	0
25% Design Package		03/07/2025	10/13/2025	221 days	0	-10
● Prepare & Submit 25% Design Submission		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...		09/23/2025	10/13/2025	21 days	0	-10

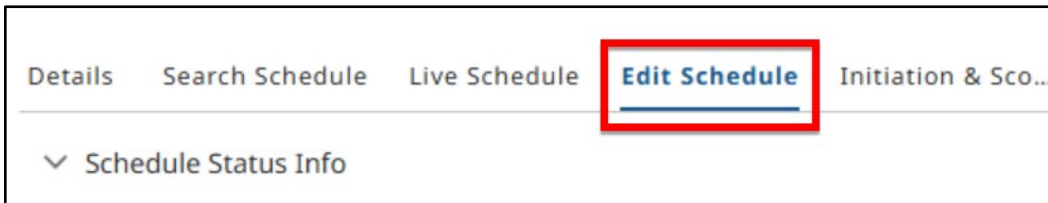
4.11.9.5 Reviewing Ad Date on the Edit Schedule Gantt Chart

Please refer to the [Reviewing Ad Date on the Edit Schedule Gantt Chart](#) section for the steps to view the Ad Date for a Project under the Edit Schedule.

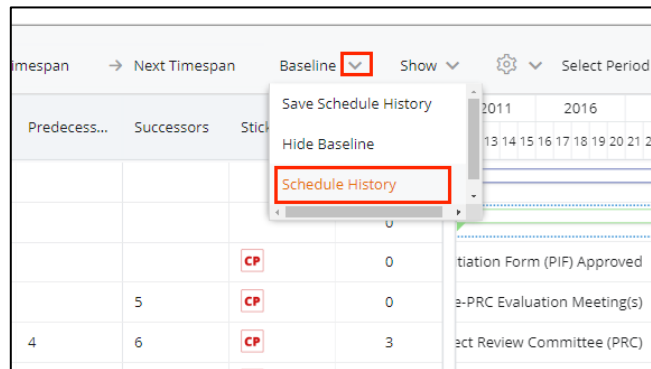
4.11.9.6 **Viewing Schedule History**

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:

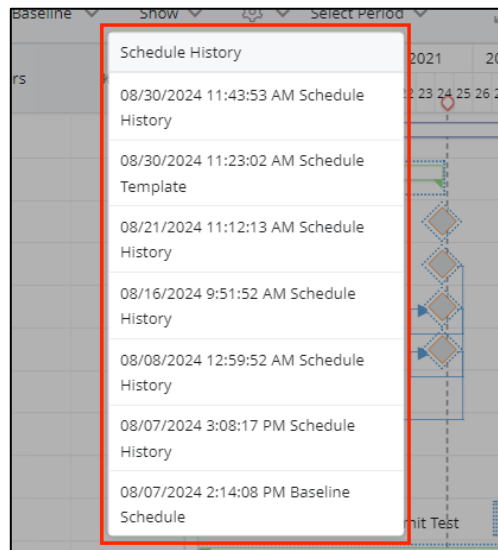
1. Go to the **Project**
2. Go to the **Edit Schedule**



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



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



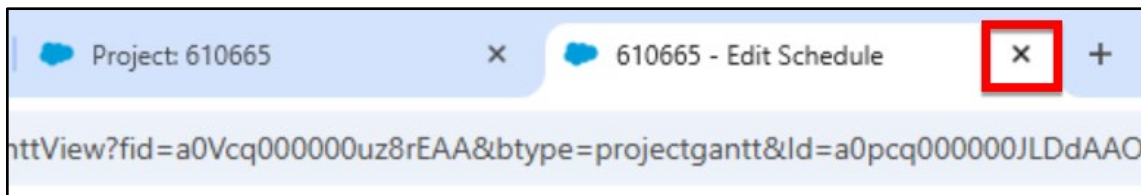
When the user clicks on the **Schedule History** snapshot, columns for the schedule's **Start Date** and **End Date** will be added. This allows the user to compare the data and manually reconstruct or update the schedule as needed.

Schedule ...	Schedule ...	ID	Name	Start
			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

4.11.10 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 [Viewing and Customizing the Edit Schedule](#) 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**.

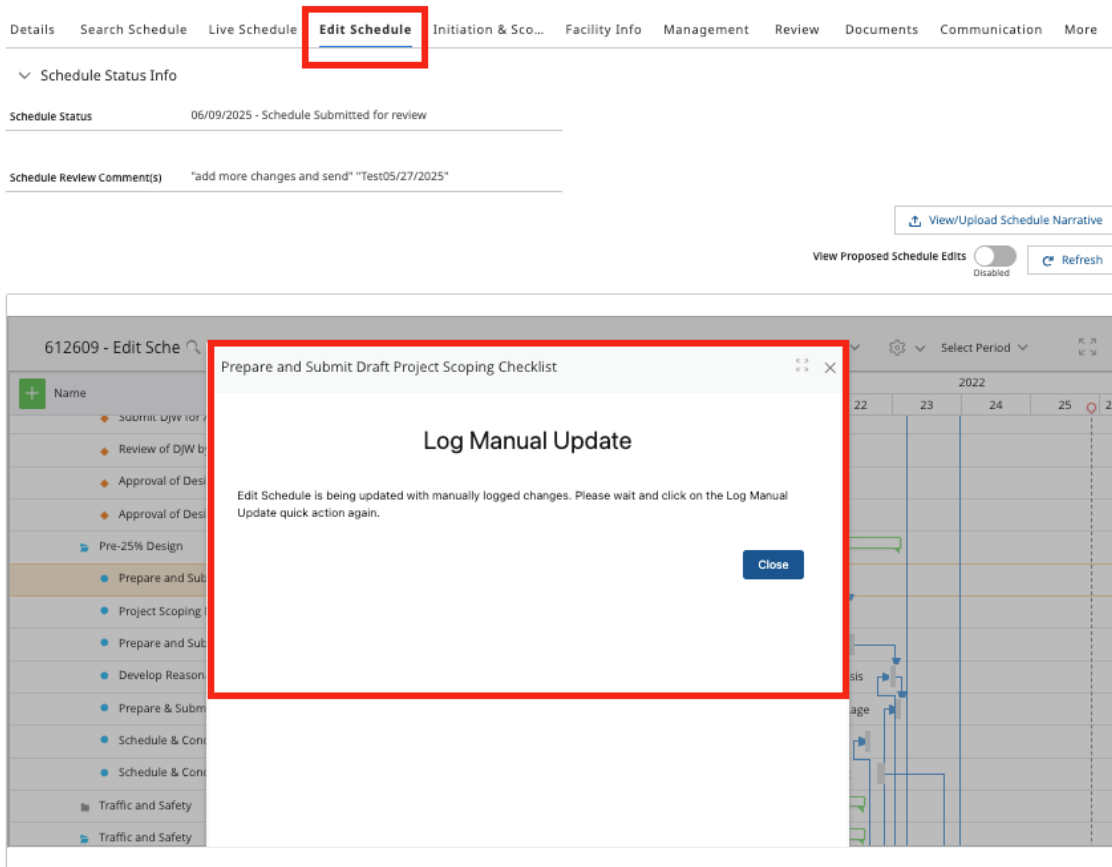
2.3.9	25% Design Package - Rev 1	01/22/2021	11/04/2021	287 days
2.3.9.1	Prepare & Submit 25% Design Submission			60 days
2.3.9.2	Send to FHWA (if PODI)			
2.3.9.3	Review 25% Design Submission & Comments to DE			
2.3.9.4	Prepare 25% Design Responses			
2.3.9.5	Schedule & Conduct Comment Resolution Meeting @25% (Full Team)			
2.3.10	Utility Coordination			
2.3.10.1	Subsurface Utility Exploration			
2.3.10.2	Schedule & Conduct Utility Early Coordination Field Meeting			
2.3.10.3	Prepare Force Account Agreements			
2.3.10.4	Prepare PUC Form			

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
2.1.1.7	Advertise Construction Contract
2.1.1.8	Release Bid Documents

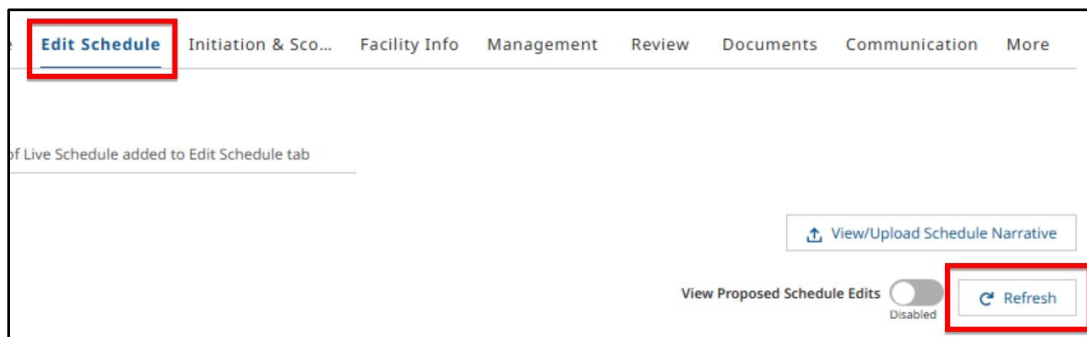
After logging a manual update, a **Manual Update (MU)** sticker will be automatically added to the selected Activity Group/Activity.

Note: Log Manual Behaviour Update - When Users Click on Log Manual Update before the previous Log Manual Update process is completed, a modal is displayed with the following message “**Edit Schedule is being updated with manually logged changes. Please wait and click on the Log Manual Update quick action again**”.



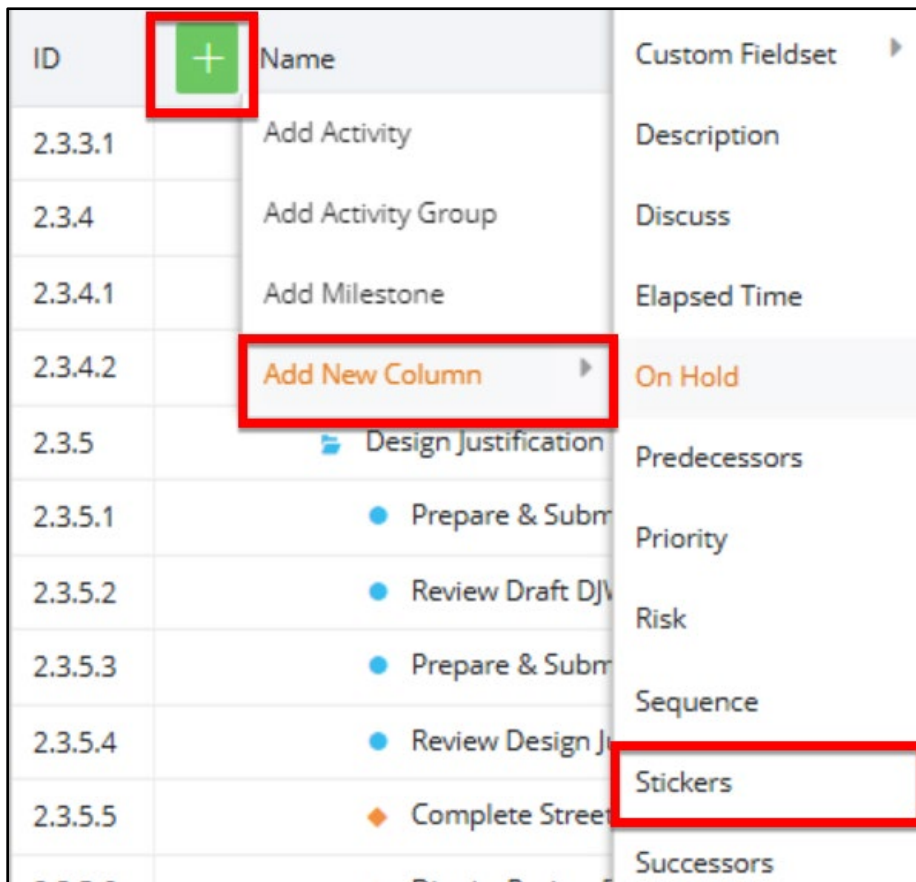
6. Click **Refresh**.

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**.

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**.

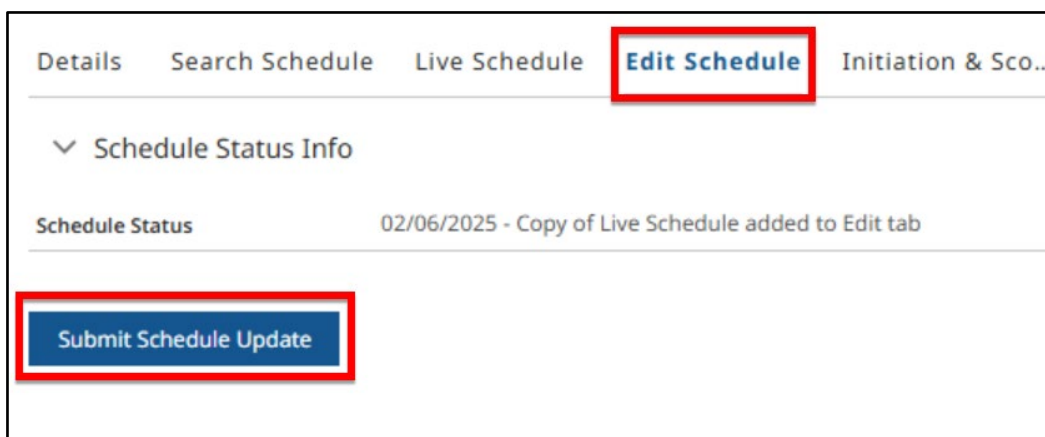
2.3.9	25% Design Package - Rev 1		01/22/2021	11/04/2021	287 days	MU
2.3.9.1	Prepare & Submit 25% Design Submission		01/22/2021	03/22/2021	60 days	MU
2.3.9.2	Send to FHWA (if PODI)		03/22/2021	03/22/2021	0 days	MU
2.3.9.3	Review 25% Design Submission & Comments to DE		07/07/2021	10/04/2021	90 days	MU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

4.11.11 Submitting Schedule Update

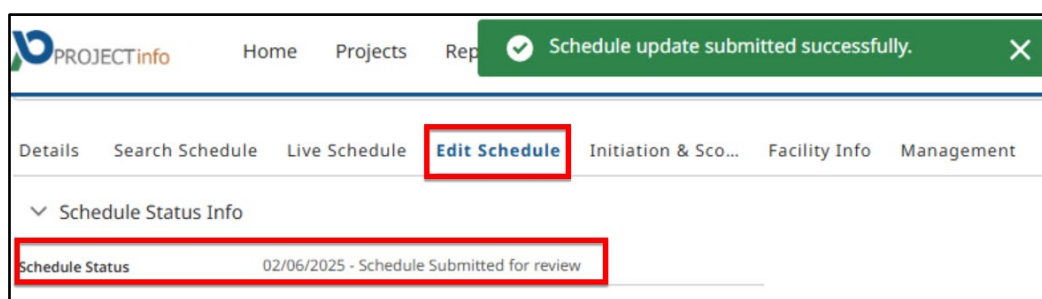
Once the proposed updates are completed and are **Logged Manual Updates** on the **Edit Schedule** tab, the External Design Lead Contact can submit the proposed changes for the Project Manager's approval.

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**.



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.



4.11.12 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 [Discrepancies Screen in the Edit Schedule](#) Section for more details.

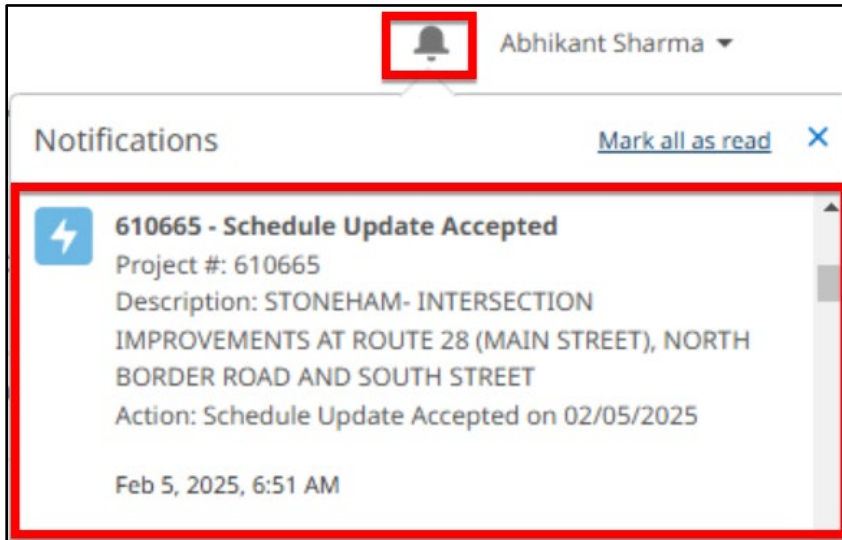
4.11.13 Uploading the Schedule Narrative Document

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 [Uploading the Schedule Narrative Document](#) section for more details.

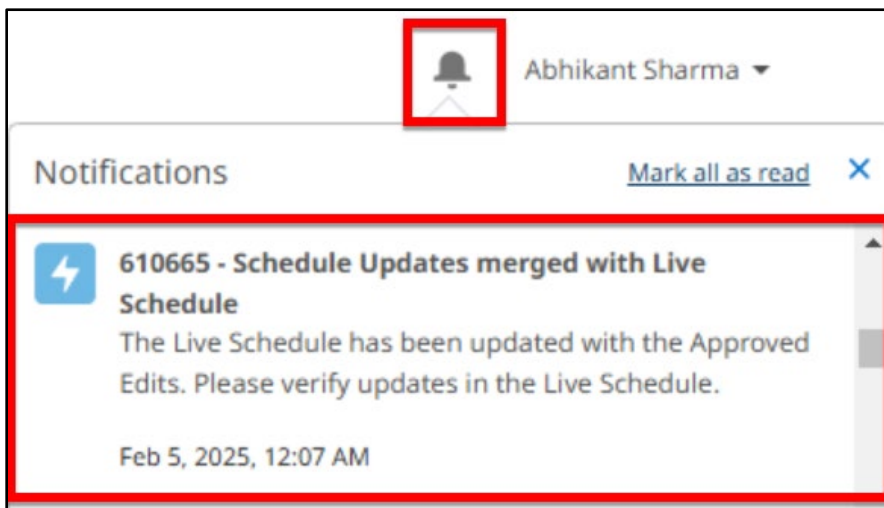
4.12 Schedule Update Accepted or Sent Back for Revision

4.12.1 Schedule Update Accepted

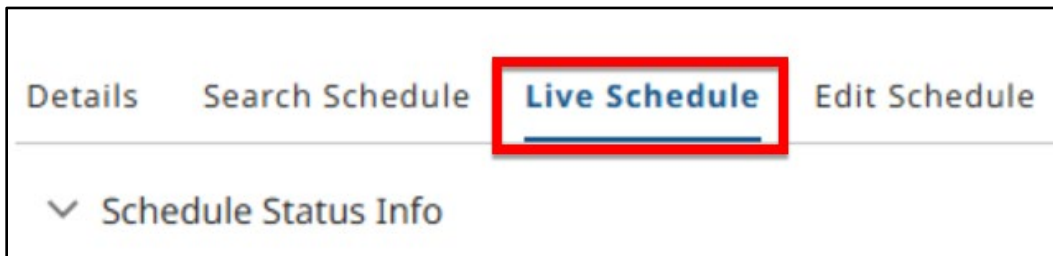
If the proposed Schedule Update(s) are satisfactory, the Project Manager accepts the Schedule Update(s). The Design Lead Contact receives a Bell Notification and an Email notifying them of the Acceptance saying **Schedule Update Accepted**.



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.**"



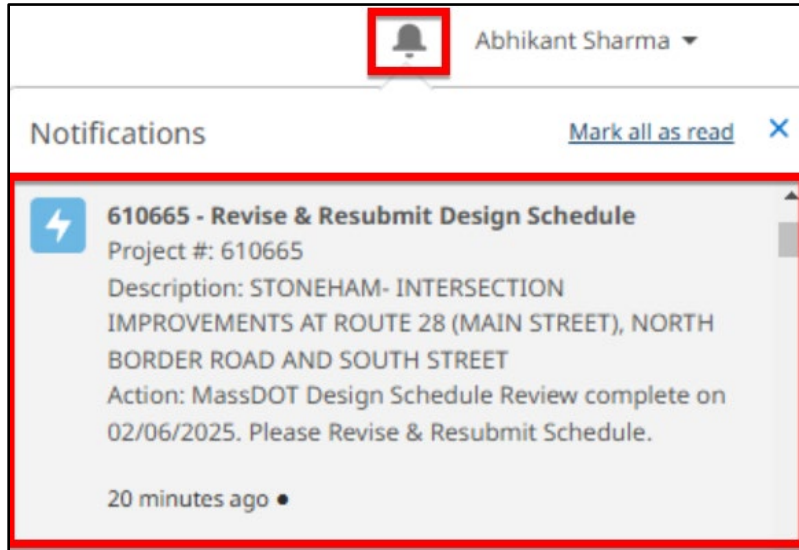
Upon receiving the notification, the **Design Lead Contact** should navigate to the **Live Schedule** to verify that the **Schedule Update(s)** have been accurately merged under the **Live Schedule** tab.



4.12.2 Schedule Update Sent Back for Revision

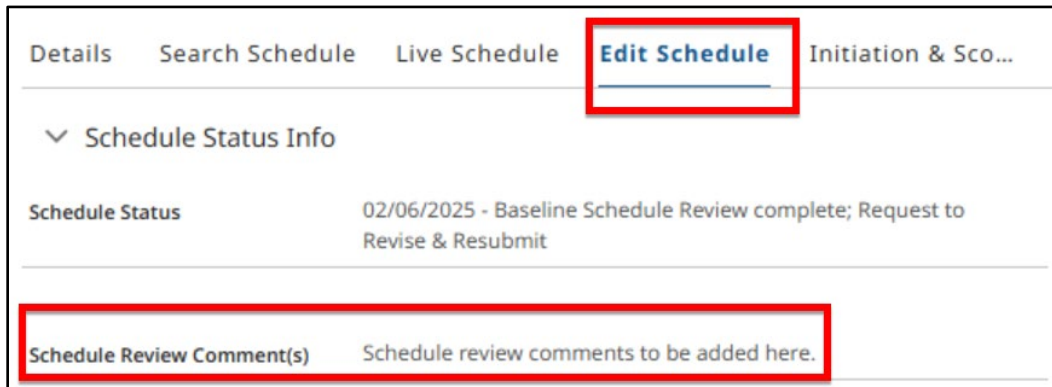
If the proposed Schedule Update(s) are unsatisfactory, the Project Manager can send the Schedule Update(s) back to **Revise and Resubmit** the Proposed Edits.

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



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.



4. The Design Lead Contact can collaborate with the Project Manager using **Chatter** as well if needed. Refer to the [Chatter](#) section for more details on using Chatter.
5. 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.

4.13 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.

4.13.1 Document Search

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

4.13.1.1 Basic Document Search

To search for a document with a Document Name:

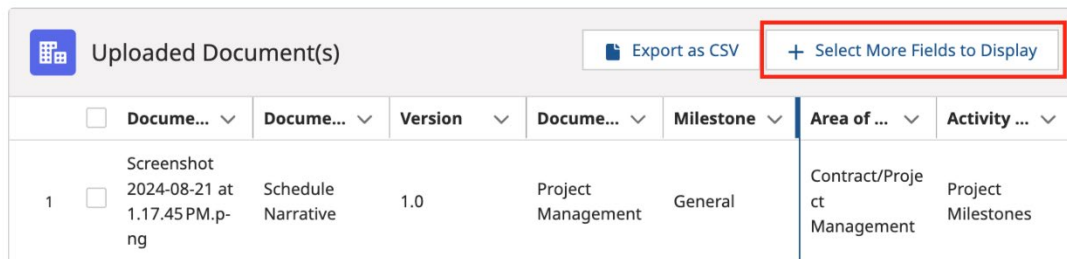
1. Go to the **Project > Documents** tab.
2. Enter the Document Name in the **Search for Document** field and click the **Search** button.

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

	Docume...	Docume...	Version	Docume...	Milestone	Area of ...	Activity ...
1	Screenshot 2024-08-21 at 1:17:45 PM, png	Schedule Narrative	1.0	Project Management	General	Contract/Proje ct Management	Project Milestones

3. The **Uploaded Document(s)** section has default columns Document Name, Document Tag, Version, Document Category, Milestone, Area of Work, and Activity Group.

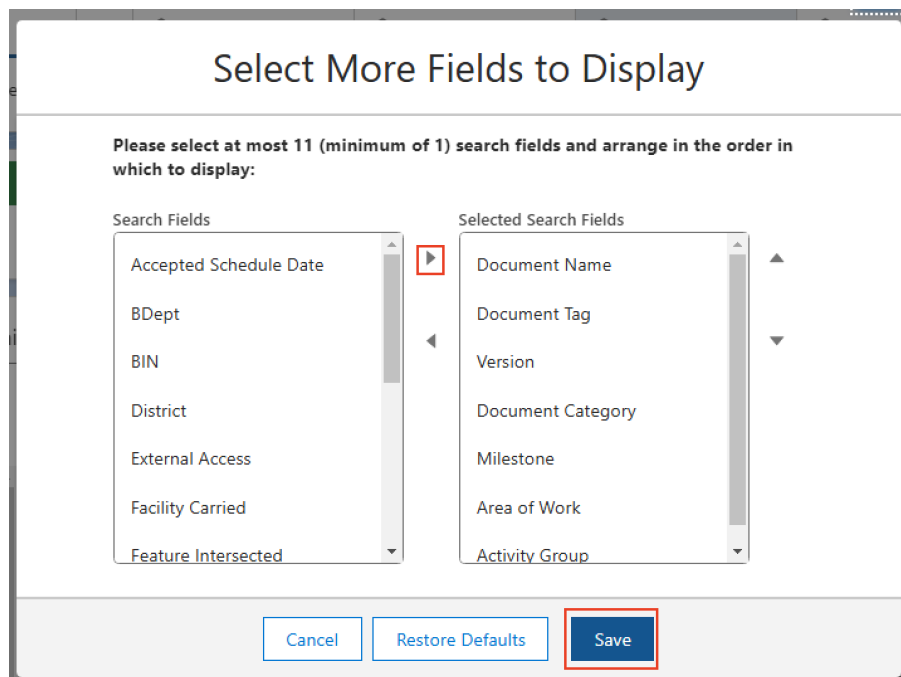
4. Use the + **Select More Fields to Display** button to customize the columns.



Uploaded Document(s)		Export as CSV		+ Select More Fields to Display			
<input type="checkbox"/>	Docume... ▾	Docume... ▾	Version ▾	Docume... ▾	Milestone ▾	Area of ... ▾	Activity ... ▾
1	<input type="checkbox"/> Screenshot 2024-08-21 at 1.17.45 PM.png	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.



Select More Fields to Display

Please select at most 11 (minimum of 1) search fields and arrange in the order in which to display:

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

Cancel Restore Defaults Save

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

4.13.1.2 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 [Schedule Search > Advanced Search](#) section.

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

Document Search

Search for Document

Q Search for a Document using any keyword(s) Search

Uploaded Document(s) Export as CSV + Select More Fields to Display

	Document Name	Document Tag	Version	Document Cate...	Milestone	Area of Work	Activity Group
1	<input type="checkbox"/> 605304 Schedule Narrative 05 Sep 24.PNG	Schedule Narrative	3.0	Project Management	General	Contract/Project Management	Project Milestones
2	<input checked="" type="checkbox"/> 605304 Right of Way Plans 10 Sep 24.PNG	75% Right of Way Plans	2.0	Submission	75%	Right of Way	75% Right of Way State
3	<input checked="" type="checkbox"/> Right of way proposed plans.PNG	Other	3.0	Submission	75%	Right of Way	75% Right of Way State
4	<input checked="" type="checkbox"/> 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
5	<input type="checkbox"/> Pre-25% Design package.PNG	Pre-25% OTS Conceptual Design Package	1.0	Submission	Pre-25%	Design	Pre-25% Design

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

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

Select Fields to Export

Please select fields to display in exported CSV:

Display Fields

- BIN
- Project Number
- Facility Carried
- Public Comment #
- Accepted Schedule Date
- District
- BDept

Selected Display Fields

- Document Name
- Document Tag
- Version
- Document Category
- Milestone
- Area of Work
- Activity Group

Cancel Export

4. 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.

Document Name	Document Tag	Version	Document Milestone	Area of Work	Activity Group
605304 Schedule Narrative 05 Sep 24.PNG	Schedule Narrative		3 Project M&G	General	Contract/F Project Milestones
605304 Right of Way Plans 2 10 Sep 24.PNG	75% Right of Way Plans	2	Submissic	75% Right of W	75% Right of Way State
Right of way proposed plans.PNG	Other	3	Submissic	75% Right of W	75% Right of Way State
605304 Right of Way Plans 10 Sep 24.PNG	75% Right of Way Plans	1	Submissic	75% Right of W	75% Right of Way State
Pre-25% Design package.PNG	Pre-25% OTS Conceptual I	1	Submissic	Pre-25% Design	Pre-25% Design
75% Design Package.PNG	75% Design Package	2	Submissic	75% Design	75% Design Package
Supporting Document.PNG	25% Design Package	2	Approval	25% Design	25% Design Package
25% Design package.PNG	25% Design Package	2	Approval	25% Design	25% Design Package
Impact Analysis.PNG	Historic/Archaeology - Fe	1	Review Co	25% Environme	Historic / Archeology (Section 106) Review
State Register Review.PNG	Historic/Archaeology - Fe	1	Review Co	25% Environme	Historic / Archeology (Section 106) Review
Public Notice.PNG	Pre-25% OTS Conceptual I	1	Submissic	25% Design	Pre-25% Design
Project Status Sheet Report (5).pdf	75% Design Package	1	Submissic	75% Design	75% Design Package
External.png	Schedule Narrative	2	Project M&G	General	Contract/F Project Milestones
Internal.png	Schedule Narrative	2	Project M&G	General	Contract/F Project Milestones
image001.png	Schedule Narrative	2	Project M&G	General	Contract/F Project Milestones
Screenshot 2024-08-21 at 1.17.45â€ PM.png	Schedule Narrative	1	Project M&G	General	Contract/F Project Milestones
PINFO UAT TEST 1.pdf	Other	2	Submissic	25% Procurem	RFQ
PINFO UAT TEST.pdf	Other	1	Submissic	25% Procurem	RFLOI
sample test MSExcel.xlsx	DPH - Response to Public	1	Project M&G	25% Design	Conduct 25% Design Public Hearing
sample test MSWord document.docx	DPH - Public Comments	1	Project M&G	25% Design	Conduct 25% Design Public Hearing
123456 Markup Summary 6-12-2024.pdf	25% Design Package	1	Review Co	25% Design	25% Design Package

4.13.2 Uploading Documents

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

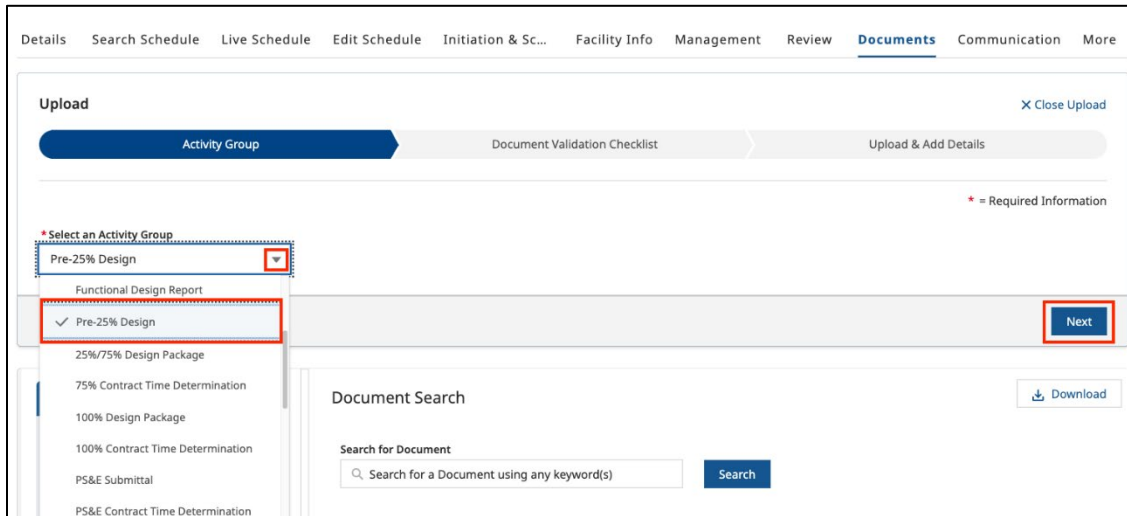
Note: For any errors in document tag selection or upload of document(s), please consult the Project Manager.

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.

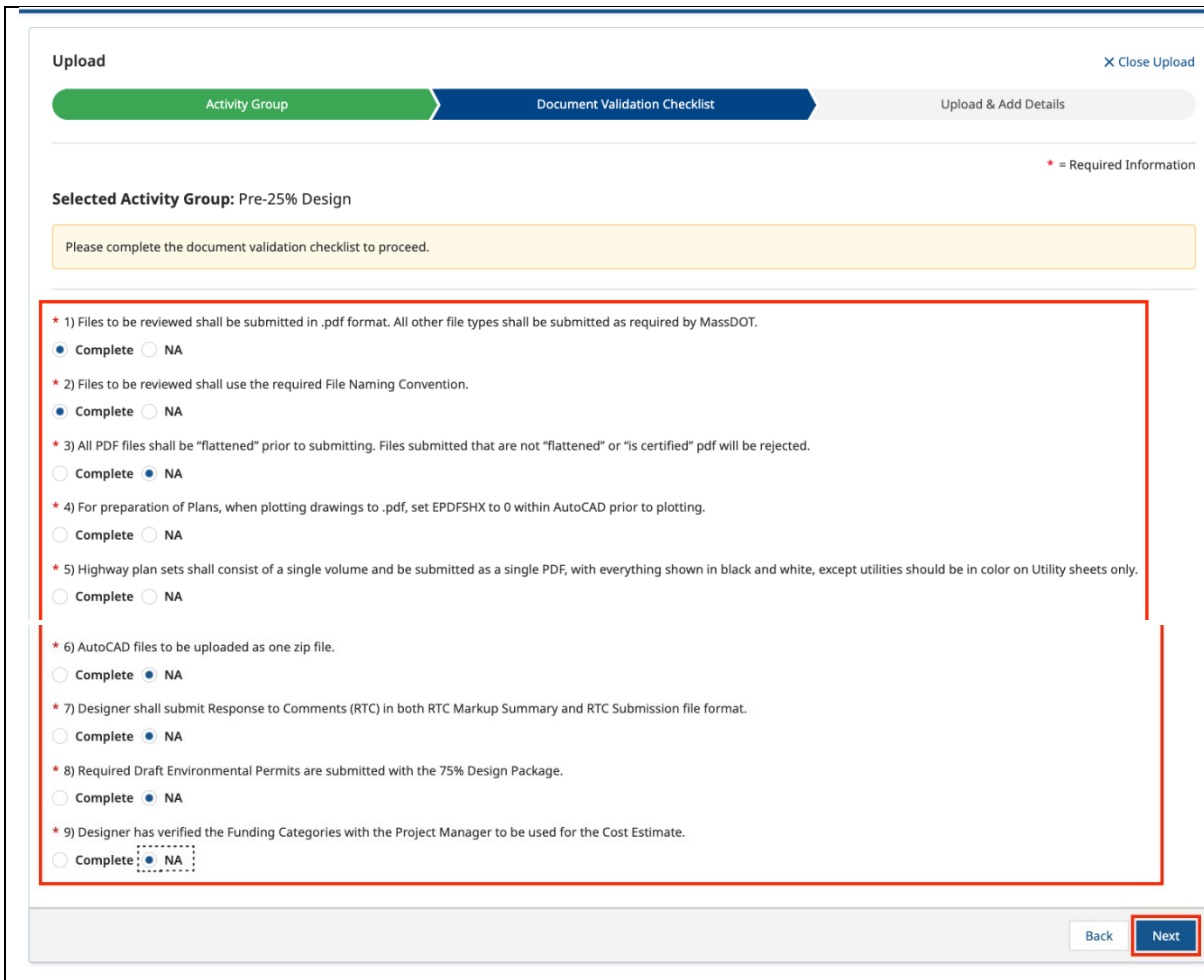
The screenshot shows the PROJECTinfo web application interface. At the top, there is a navigation bar with 'Home', 'Projects', 'Reports', 'My Profile', 'Help', and 'Manage Users'. Below this, there is a section for 'Assigned Section: Major Projects' and 'STIP Year(s):'. A progress bar shows the current stage as 'Pre-25%' with a date of 8/21/2024. Below the progress bar, there is a 'Documents' tab highlighted in red. Under the 'Documents' tab, there is a 'Document Search' section with a search box and a 'Search' button. To the right of the search box, there are two buttons: 'Upload' and 'Download', both highlighted in red.

3. Under the Activity Group, click the **Select an Activity Group** down arrow, select the **Pre-25% Design** option, and click the **Next** button.

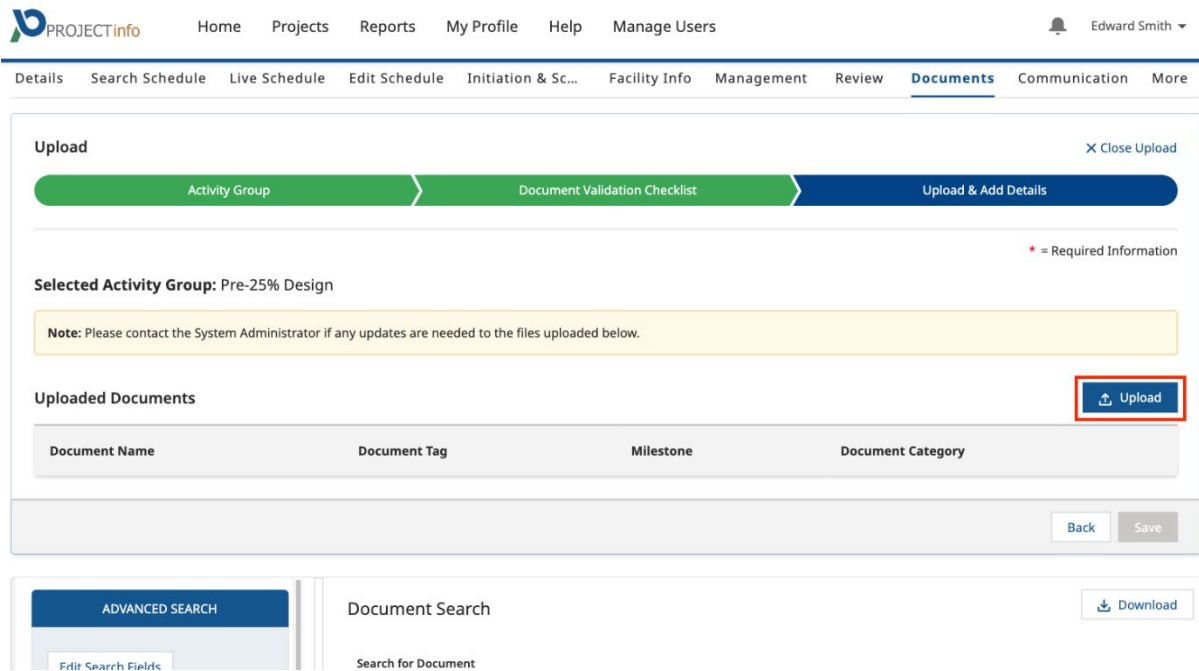


4. Under **Document Validation Checklist** select the required answers and click the **Next** button.

5. **Note:** You can click the **Back** button to go to the previous page.



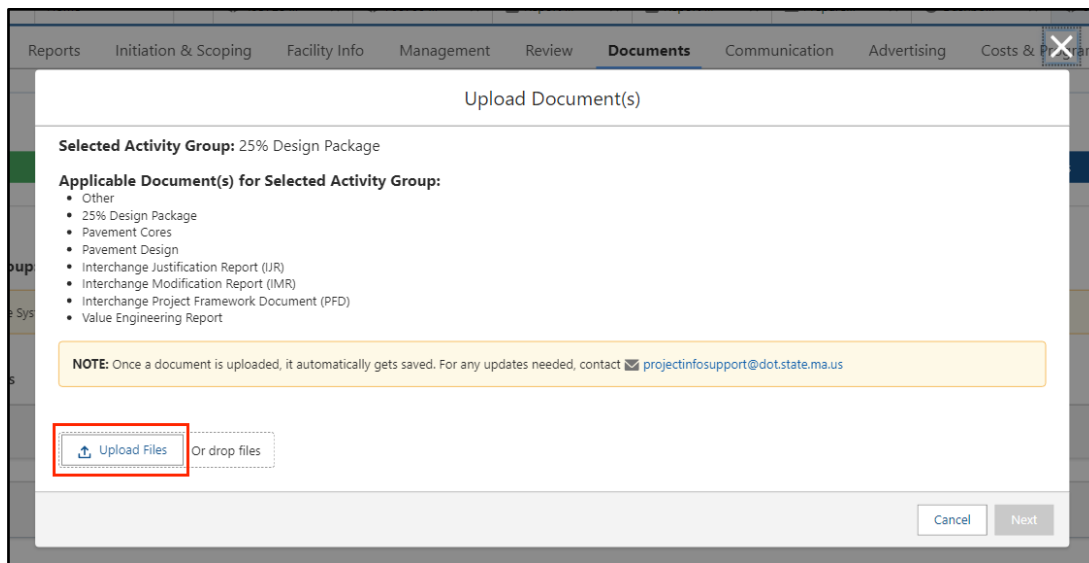
6. After clicking next the user advances to the **Upload & Add Details** chevron. Locate and click the **Upload** button.



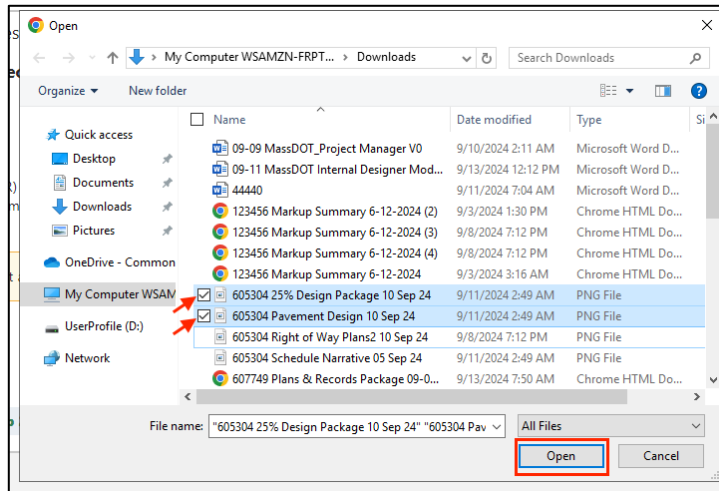
An **Upload Document(s)** pop-up displays.

7. 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**.

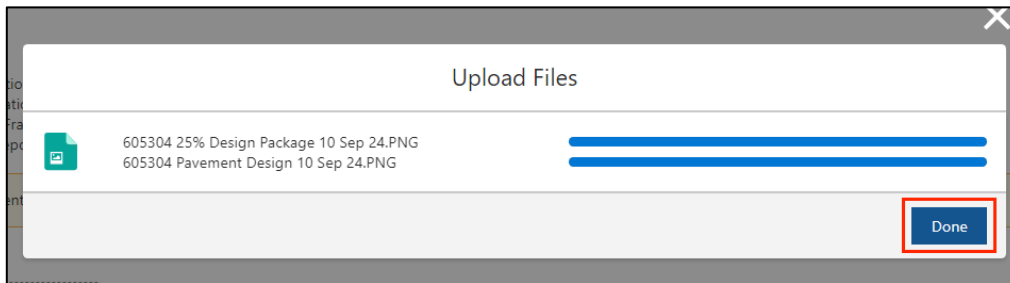
Note: Users can upload multiple files.



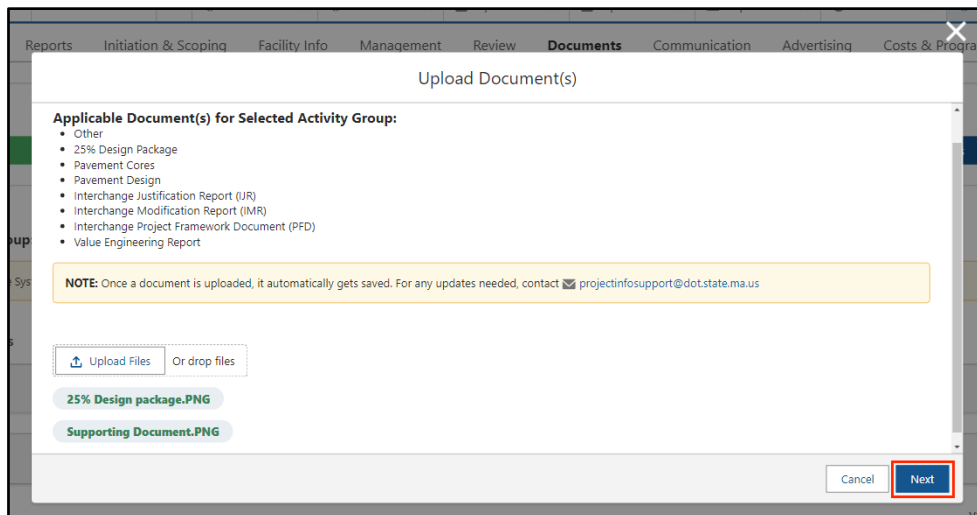
8. A File Explorer pop-up displays. Select the required document(s) and click the **Open** button.



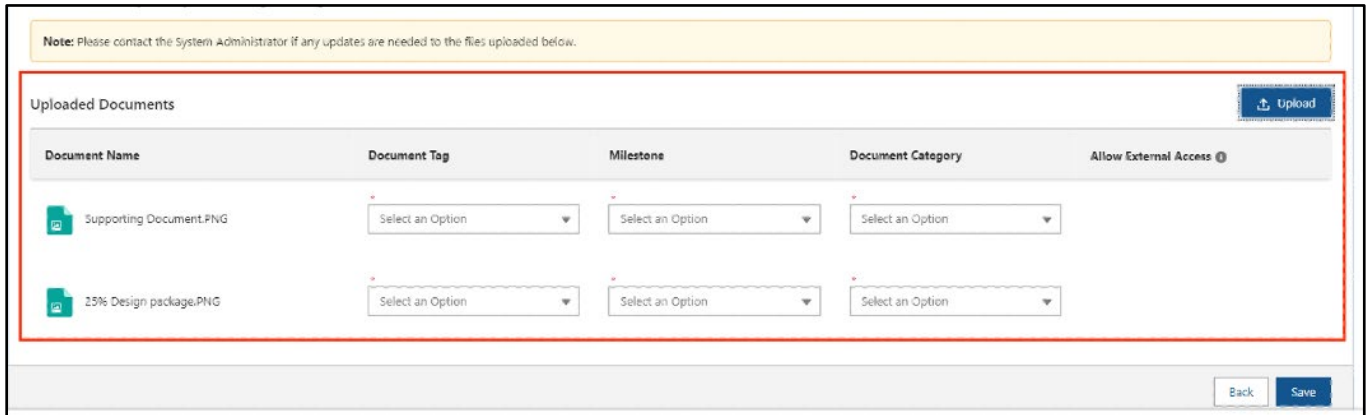
9. Once the document(s) are uploaded, click the **Done** button.



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



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

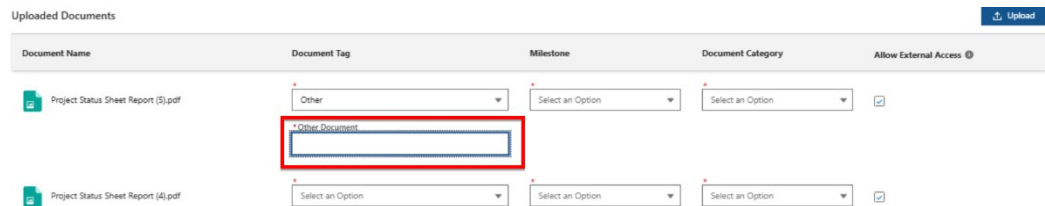


12. Click the down arrow in the **Document Tag** column and select the required option (For example, Pre-25% OTS Conceptual Design Package) from the dropdown.

(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.



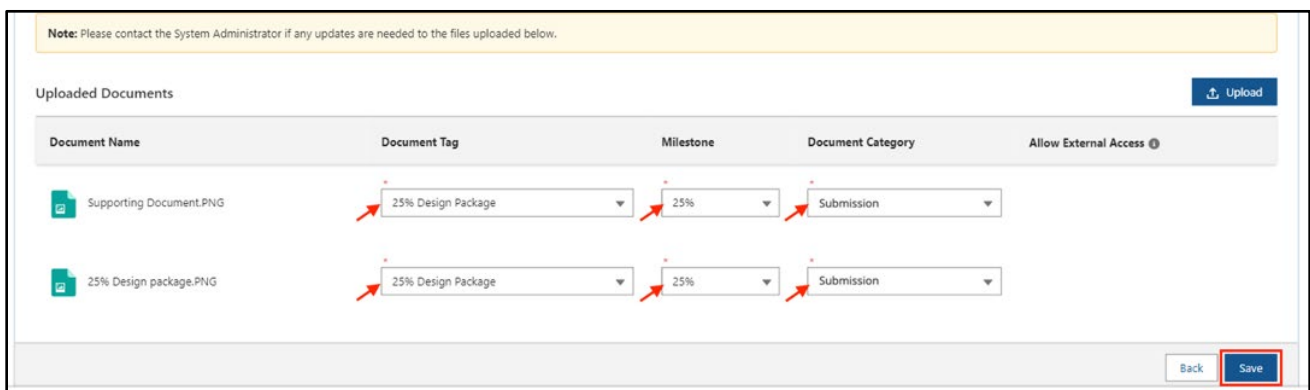
(c)

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.



The Uploaded documents will be displayed under the Documents tab.

Uploaded Document(s)							
<input type="checkbox"/>	Document Name	Document Tag	Version	Document Cate...	Milestone	Area of Work	Activity Group
1	<input type="checkbox"/> Supporting Document.PNG	25% Design Package	2.0	Submission	25%	Design	25% Design Package
2	<input type="checkbox"/> 25% Design package.PNG	25% Design Package	2.0	Submission	25%	Design	25% Design Package
3	<input type="checkbox"/> Impact Analysis.PNG	Historic/Archaeology - Federal Section 106 and State - Impact Analysis	1.0	Review Comments	25%	Environmental	Historic / Archeology (Section 106) Review
4	<input type="checkbox"/> State Register Review.PNG	Historic/Archaeology - Federal Section 106 and State Register Review	1.0	Review Comments	25%	Environmental	Historic / Archeology (Section 106) Review

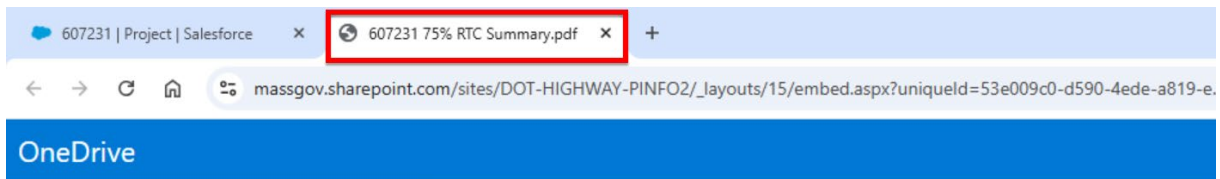
A Bell Notification is sent out to the Project Manager once the documents are successfully uploaded.

4.13.3 Previewing Documents

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

Uploaded Document(s)								
<input type="checkbox"/>	Document ...	Docum...	Docum...	Milestone	Area of ...	Activity...	Upload Date	Upload ...
1	<input type="checkbox"/> 607231 75% RTC Summary.pdf	75% Design Package	Response to Comments	75%	Design	75% Design Package	6/4/2025	Greg Frazier
2	<input type="checkbox"/> 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.



607231 75% RTC Summary

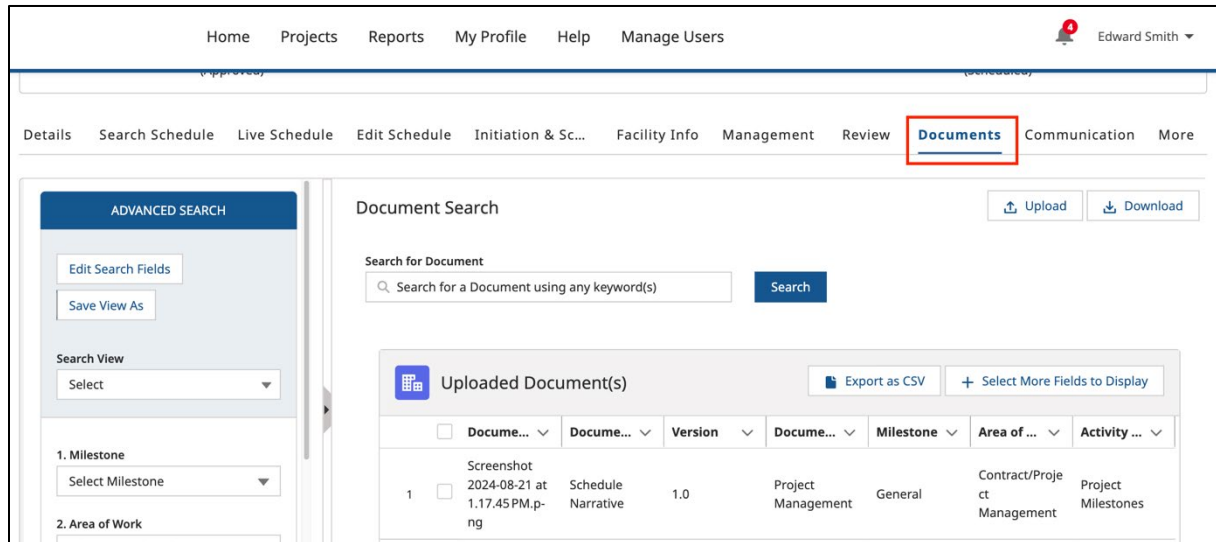
Markup	Author	File Name	Page Label	Page In...	Subject	Status	Comments
cinquegrancp (4)	cinquegrancp	006_607231_Special_Provisions_75%.pdf	5	5	Text Box	Approved set by gdussseau on 4/14/2025 at 11:50:53 AM	The following language is necessary for inclusion into the put-in section of the Special Provisions: CONTAMINATED SOIL. Soil to be removed from the project area shall not be assumed to be uncontaminated and must be evaluated prior to off-site management for potential contamination with hazardous materials. No soil may be disposed of off-site without proper assessment by the contractor and approval from the Resident Engineer (RE), District Environmental Engineer (DEE), or the project designer.
	gdussseau	006_607231_Special_Provisions_75%.pdf	5	5	Re: Text Box		Will revise for next submission.
	cinquegrancp	007_607231_CPE_75%.pdf	2	2	Text Box	Approved set by edoty on 4/9/2025 at 10:54:09 AM	Please add the missing items in the 180181 series, please adjust disposal volumes as noted in attached memo.
	edoty	007_607231_CPE_75%.pdf	2	2	Re: Text Box		Items will be added with the appropriate quantities.
	cinquegrancp	007_607231_CPE_75%.pdf	2	2	File Attachment	Approved set by edoty on 4/17/2025 at 8:01:42 AM	
	cinquegrancp	007_607231_CPE_75%.pdf	2	2	Text Box	Approved	Additional items 18011 & 1802 may be required

4.13.4 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**.



2. On the **Advanced Search** left panel, select the **Activity Group** as **25% Design Package** and click the **Search** button.

The screenshot shows the 'Document Search' interface. On the left, the '3. Activity Group' dropdown is set to '25% Design Package X'. The 'Search' button is highlighted with a red box. The main area displays a table of 'Uploaded Document(s)' with the following data:

	Document N...	Document Tag	Version	Document C...	Milestone	Area of Work	Activity Group
1	Public Notice.PNG	Pre-25% OTS Conceptual Design Package	1.0	Submission	25%	Design	Pre-25% Design
2	Project Status Sheet Report (5).pdf	75% Design Package	1.0	Submission	75%	Design	75% Design Package
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
5	image001.png	Schedule Narrative	2.0	Project Management	General	Contract/Project Management	Project Milestones
6	Screenshot 2024-08-21 at 1.17.45 PM.png	Schedule Narrative	1.0	Project Management	General	Contract/Project Management	Project Milestones
7	PINFO UAT TEST 1.pdf	Other	2.0	Submission	25%	Procurement Phase	RFQ
8	PINFO UAT TEST.pdf	Other	1.0	Submission	25%	Procurement Phase	RFLOI

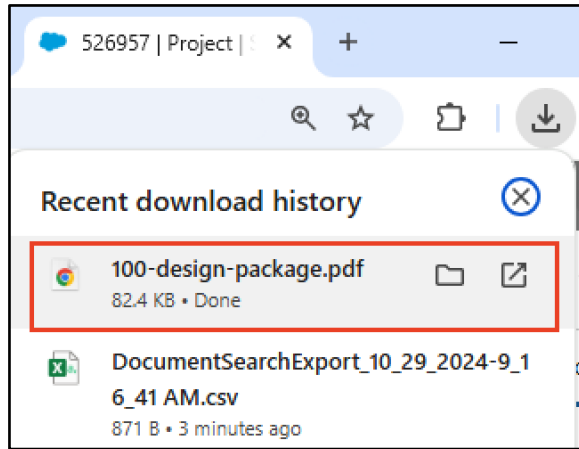
The list of documents within the selected activity group will be displayed under the **Uploaded Document(s)** section.

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

The screenshot shows the 'Document Search' interface with the search results. The 'Download' button is highlighted with a red box. The table of 'Uploaded Document(s)' is filtered to show only documents from the '25% Design Package' activity group. The checkboxes for the first two documents are selected:

	Document Name	Document Tag	Version	Document Categ...	Milestone	Area of Work	Activity Group
1	605304 25% Design Package 10 Sep 24.PNG	25% Design Package	1.0	Submission	25%	Design	25% Design Package
2	605304 Pavement Design 10 Sep 24.PNG	25% Design Package	1.0	Submission	25%	Design	25% Design Package

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.



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](#)

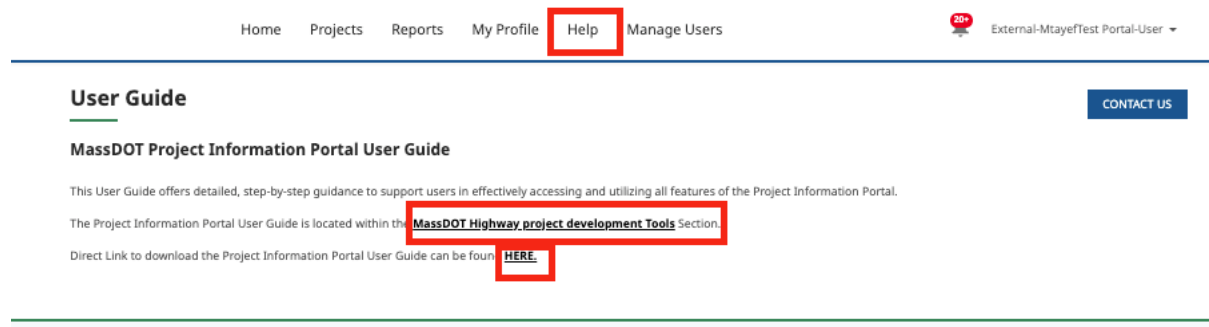
Contact us

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

5.1 Help

Under the **Help** tab users can access the **MassDOT Project Information Portal User Guide**.

1. Select **MassDOT Highway project development Tools** to open the guide directly in a web browser
2. Select **HERE** to download the **Project Information Portal User Guide** directly



Home Projects Reports My Profile **Help** Manage Users External-MtayeFFest Portal-User

User Guide

MassDOT Project Information Portal User Guide

This User Guide offers detailed, step-by-step guidance to support users in effectively accessing and utilizing all features of the Project Information Portal.

The Project Information Portal User Guide is located within the **MassDOT Highway project development Tools** Section.

Direct Link to download the Project Information Portal User Guide can be found **HERE**.

[CONTACT US](#)

6 Appendix

6.1 ProjectInfo Definitions

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

TERM	DEFINITION
App	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

TERM	DEFINITION
	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_Information Portal offers restricted access as required for contracted staff to access and collaborate on features of a Project they are assigned to.
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
Dependency	<p>A dependency is a link between two activities or between an activity and a milestone.</p> <p>There are 4 types of dependencies, <i>Finish to start (FS)</i>, <i>Finish to finish (FF)</i>, <i>Start to start (SS)</i>, and <i>Start to finish (SF)</i>.</p> <p>A dependency can be created within a single project Plan Gantt Board.</p>
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</i> , <i>start-to-start</i> , <i>finish-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%
	25% Design
	75% Design
	100% Design
	Critical Path
	Activity Risk Added
	Custom
	Automatic Update
	Not Applicable
	Major Milestone
	Manual Update
	PS&E
	Reporting

