



MassDOT Project Information Portal

User Guide

V 1.1

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Version History

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 are able to work directly on Live Schedule after getting the access
- Project Managers are able to revoke the Edit Access for the Design Lead Contact(s) once the updates are done

Document Management:

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

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

1. Purpose of this Guide

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

2. Introduction

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

Role(s)	Responsibilities/Activities
External Design Lead Contact	<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
Design Firm Admin (DFA)	<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.

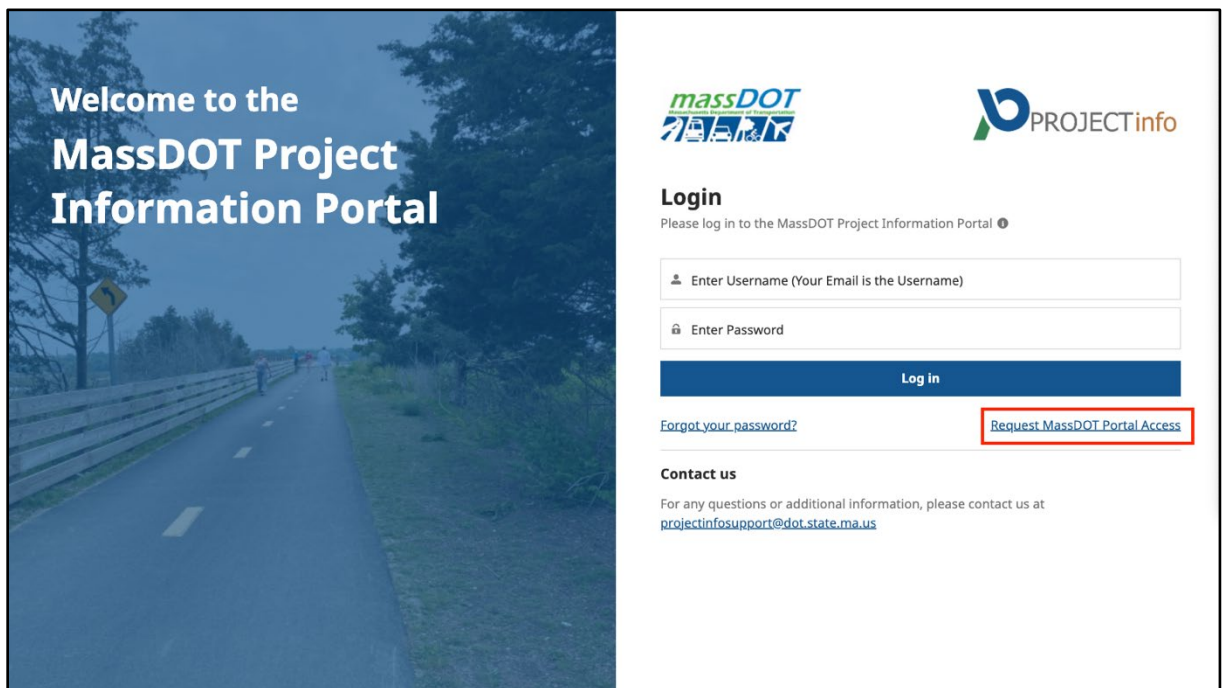
For all other users:

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:

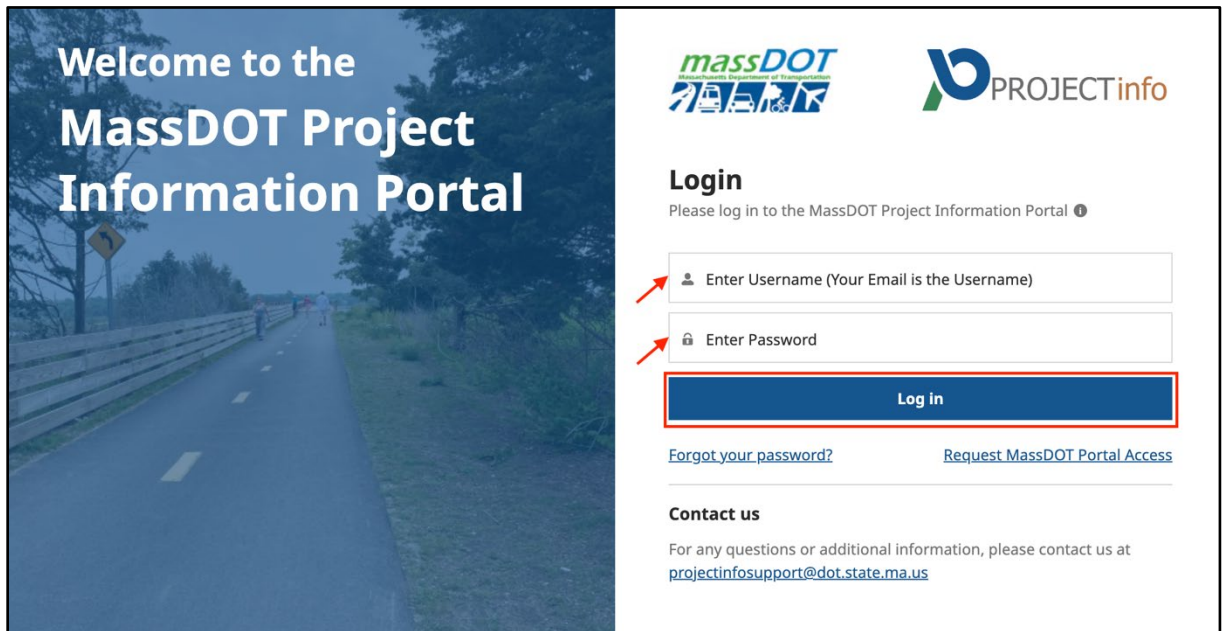
- To cancel the request, the users can click the **X** icon or **Cancel** button.
- In case of any questions or more information, users can contact the support team via projectinfosupport@dot.state.ma.us

3.2 Logging In

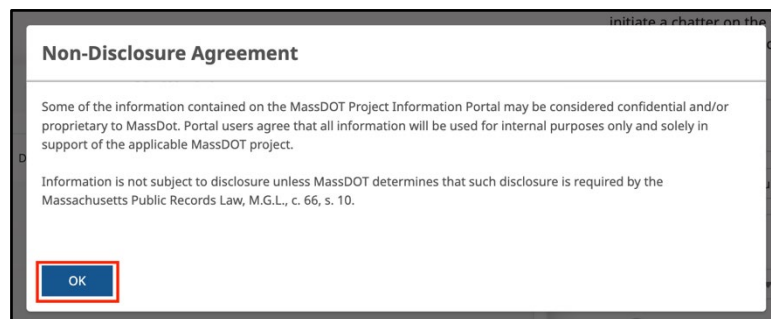
Prerequisite: User access to the Project Information Portal is approved, and a login password is set.

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

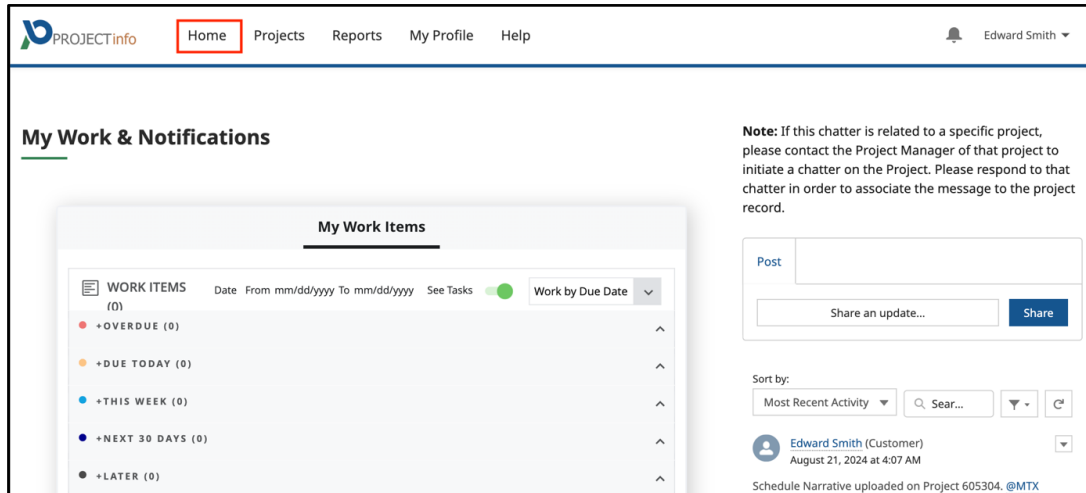
1. Go to the **MassDOT Project Information Portal** [login](#) page.
2. Enter **Username** and **Password** and click **Log in**.



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



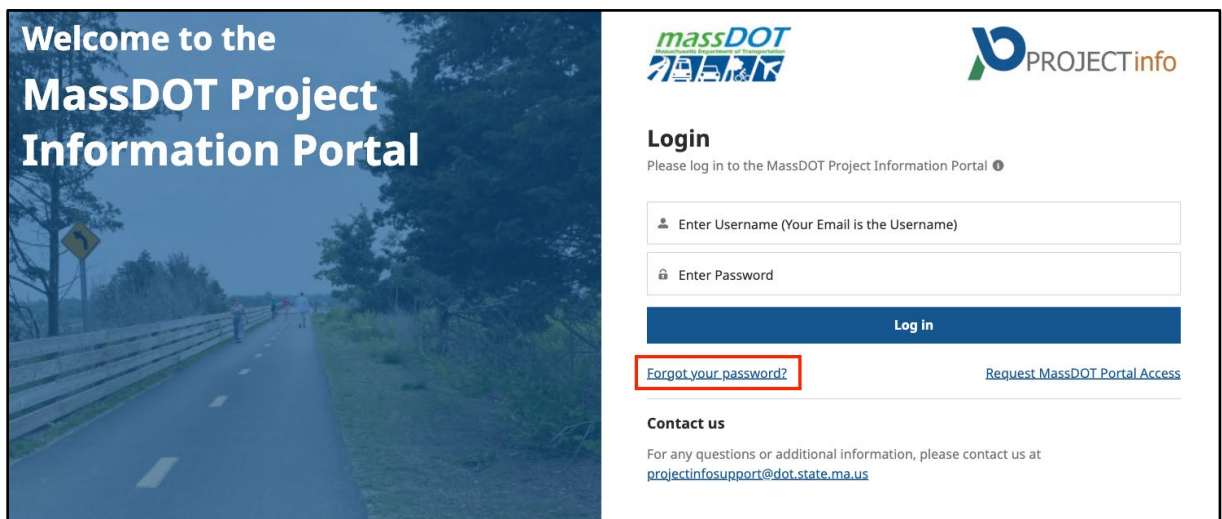
4. The user will be directed to the **Home** page



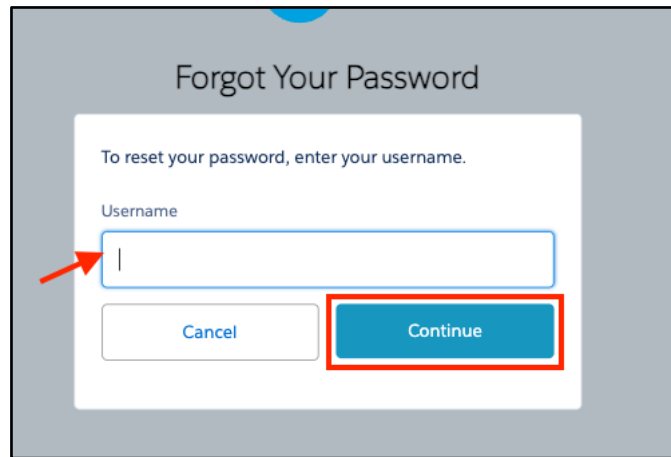
3.3 Forgotten Password

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

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



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

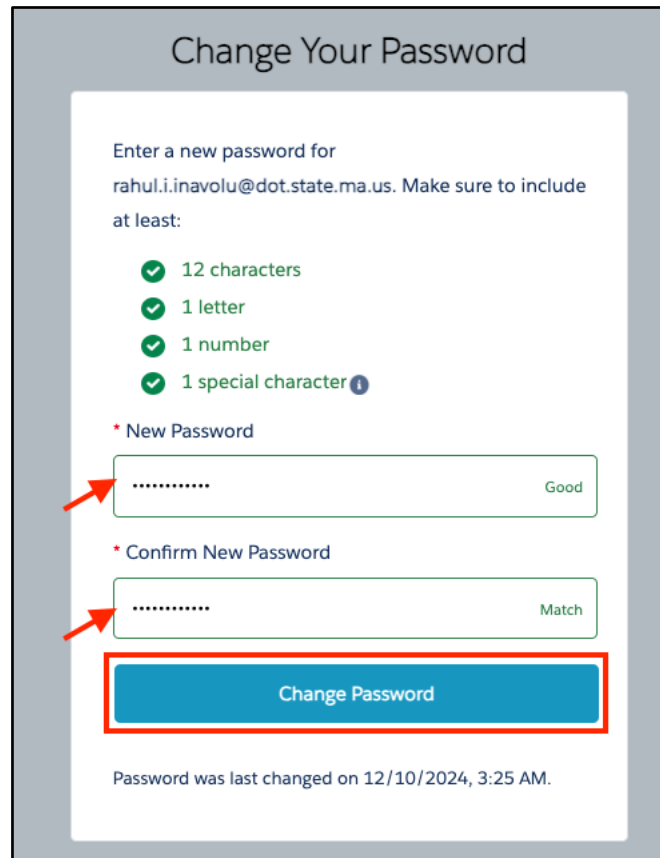


Forgot Your Password

To reset your password, enter your username.

Username

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.

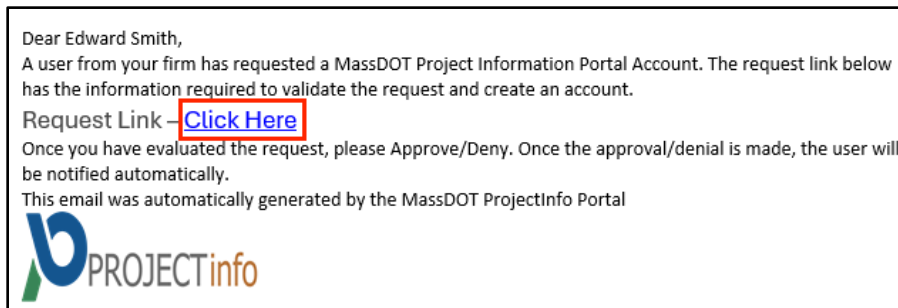
Note: A Design Firm Admin can perform all roles that an External Design Lead Contact can.

4.1.1 Design Firm Admin Reviewing the Request

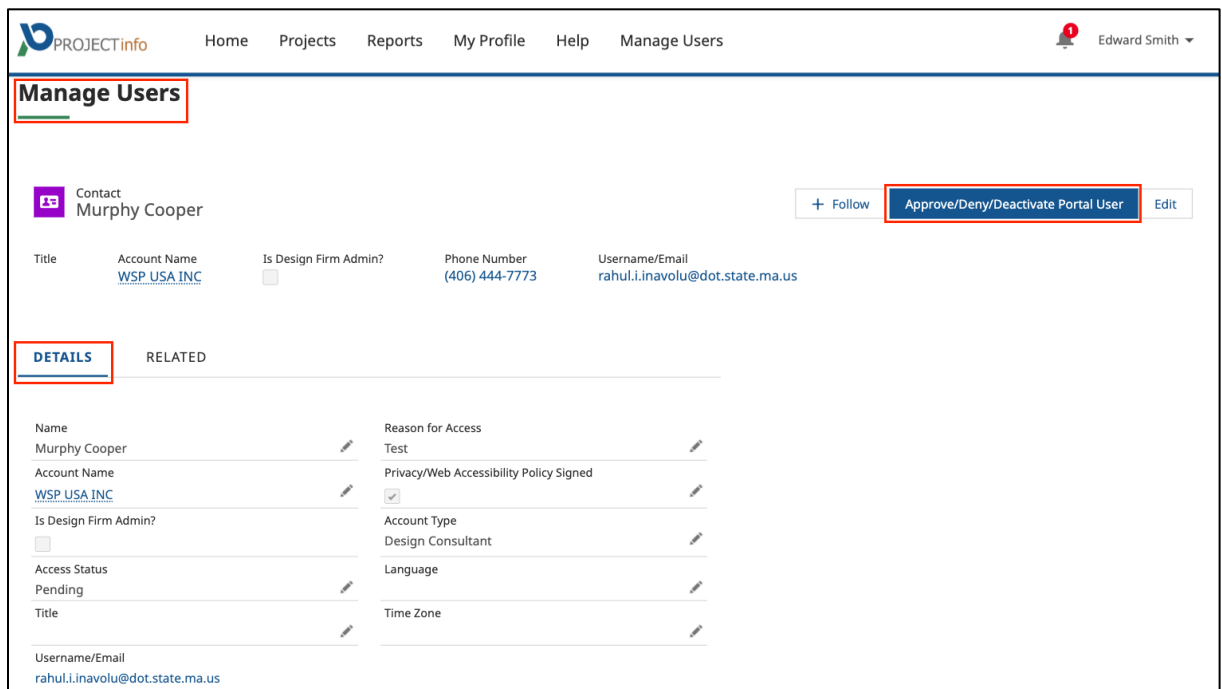
The **Design Firm Admin (DFA)** will receive an **email notification** containing a link to review the **access requests** for users in their **Design Firm**. This is to ensure that only authorized personnel from the Design Firm can access **Project Information** and manage tasks on the MassDOT Project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

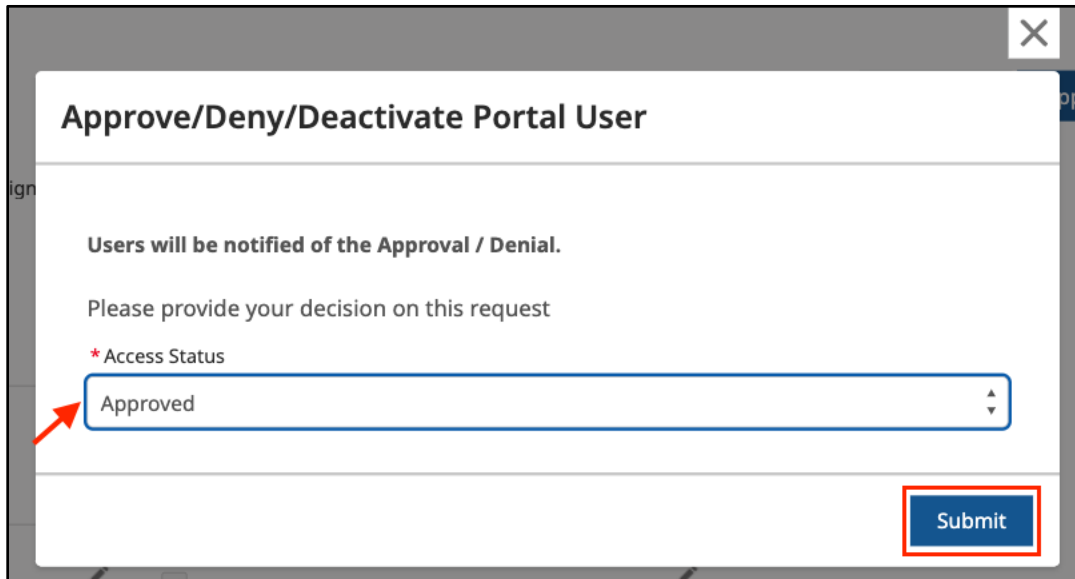


2. Users will be redirected to the MassDOT ProjectInfo Portal Login page. For more details on logging in, follow the steps outlined in the [Logging In](#) section.
3. Once logged in, Review the **Contact** details e.g., **Name, Email, Reason for Access** etc.
4. Click the **Approve/Deny/Deactivate Portal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

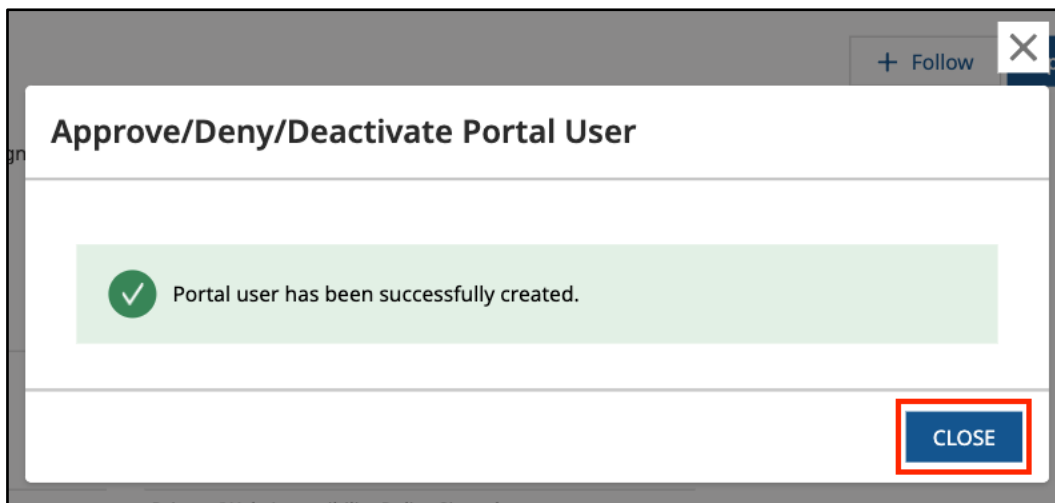


5. An **Approve/Deny/Deactivate Portal User** pop-up displays.

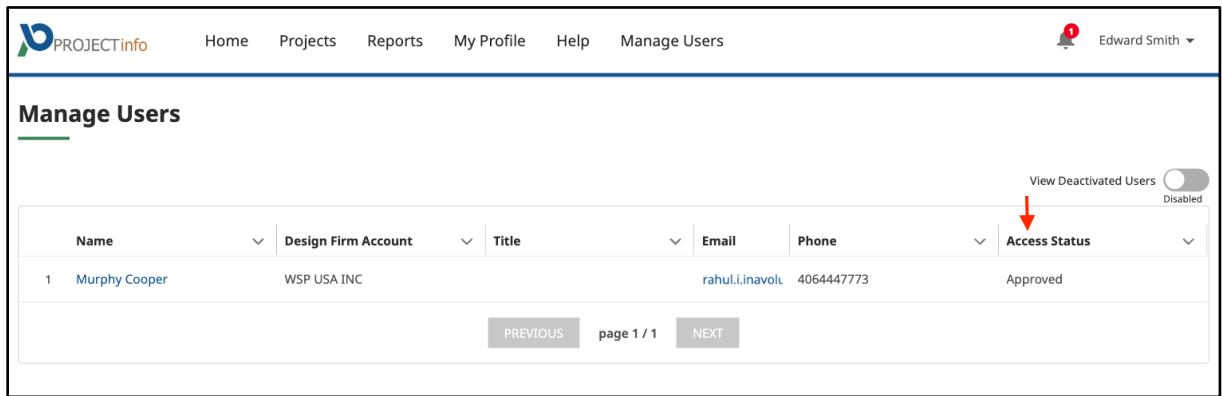
6. If the details are valid, select "**Approved**" from the dropdown list and click the **Submit** button. Else, if the details are invalid, select "**Decline**" and click **Submit**.



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.

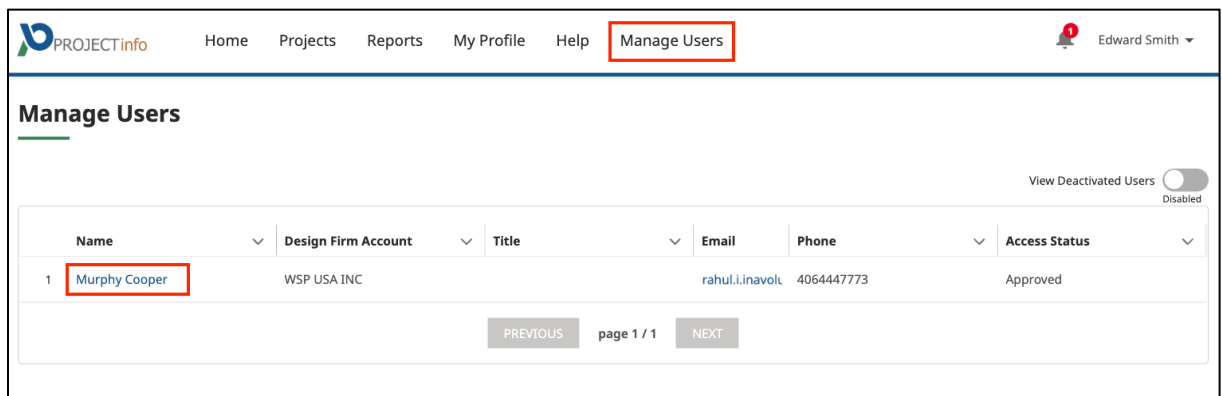


4.1.2 Design Firm Admin Deactivating the User

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**.

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

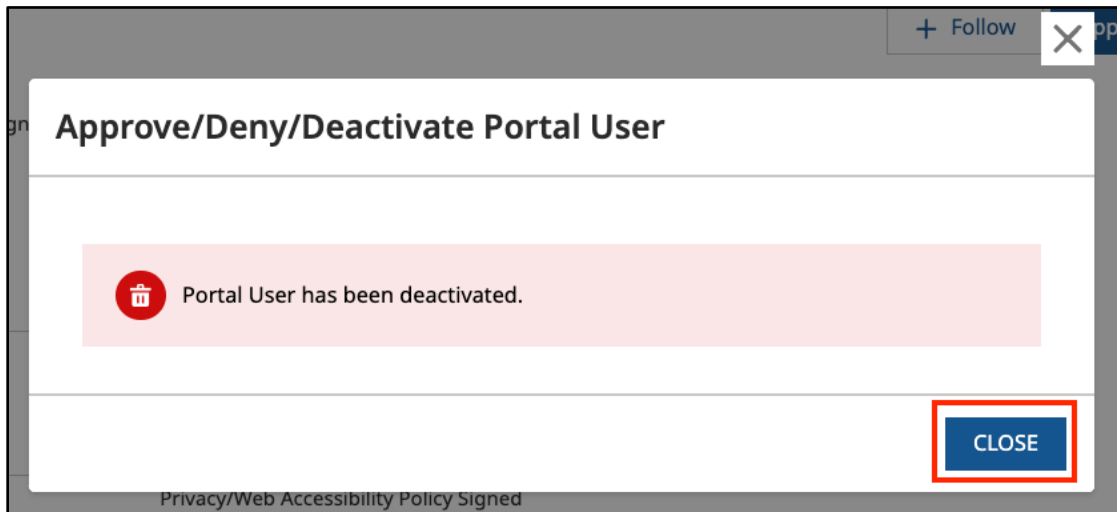
Please provide your decision on this request

* Access Status

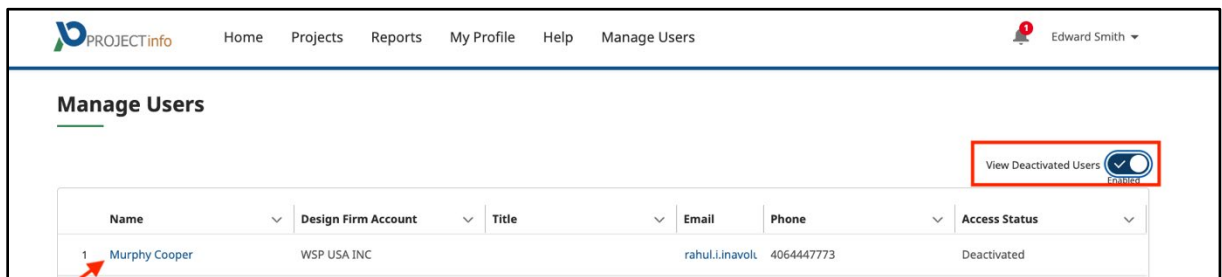
Deactivate

Submit

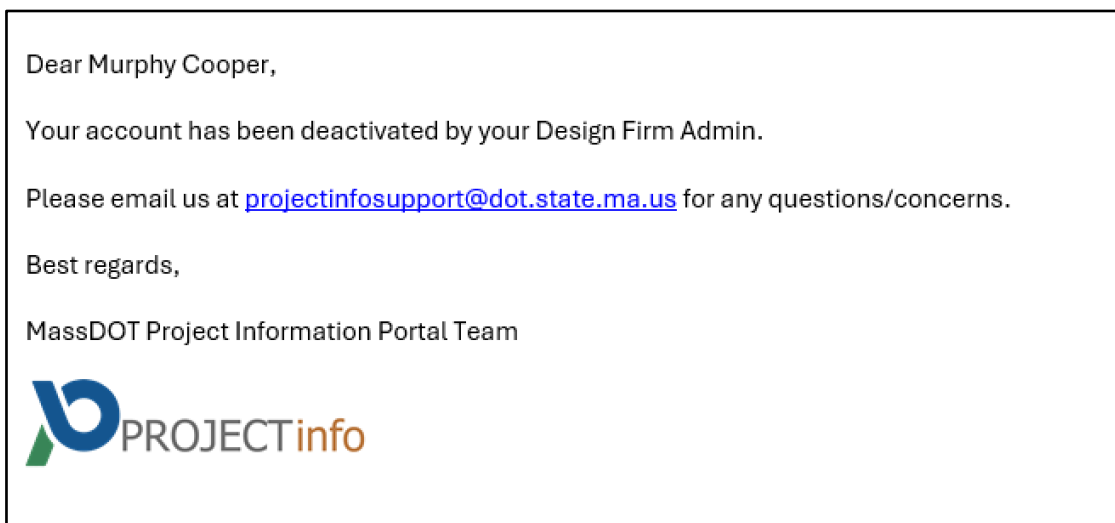
8. A message '**Portal User has been deactivated**' displays.
9. Click the **Close** button.



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 Project Schedule and preparing/uploading Design Package Submissions.

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

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

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

Request Access
Enter information below to gain access to the MassDOT Project Information Portal.

* Indicates required field

* First Name: Ahikant

* Last Name: Sharma

* Account Type: Design Consultant

* Design Firm: Ready

* Email: Abhikant.s.sharma@dot.state.ma.us

* Phone Number: (405) 665-4557

* Reason For Access: Please provide me with access

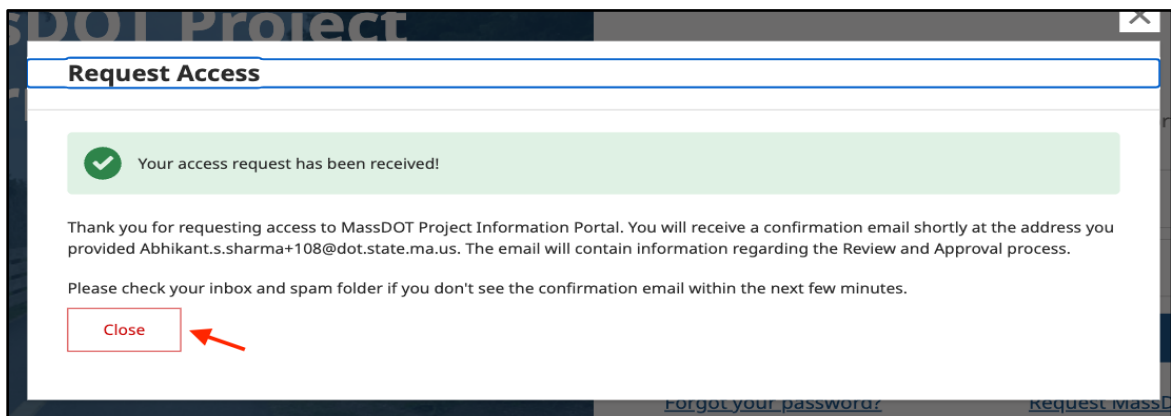
Review the [Mass.gov Privacy Policy](#) and [Web Accessibility Statement](#) to proceed

☒ * I have read and accept the Mass.gov Privacy Policy and Web Accessibility Statement

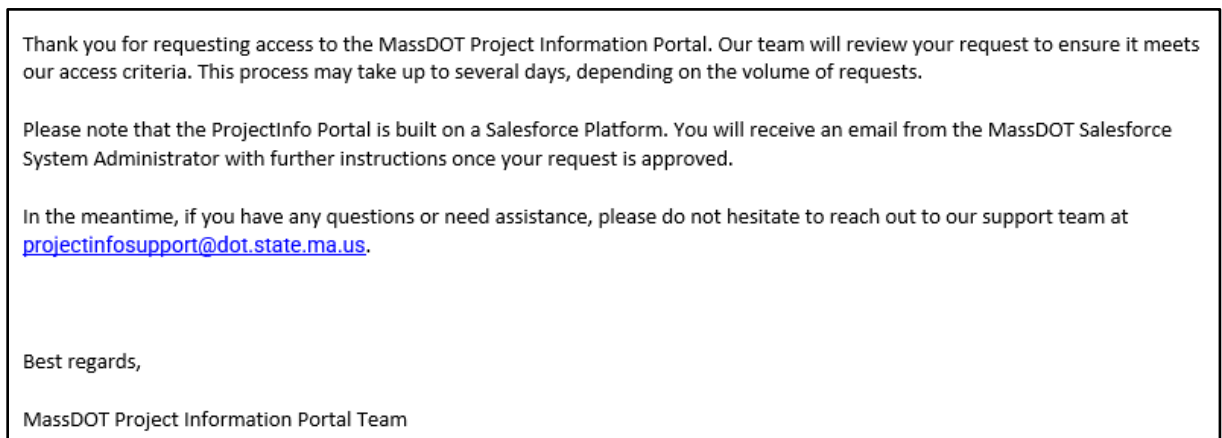
Contact us
For any questions or additional information, please contact us at projectinfosupport@dot.state.ma.us

[Cancel](#) [SUBMIT](#)

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**.



8. 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.



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

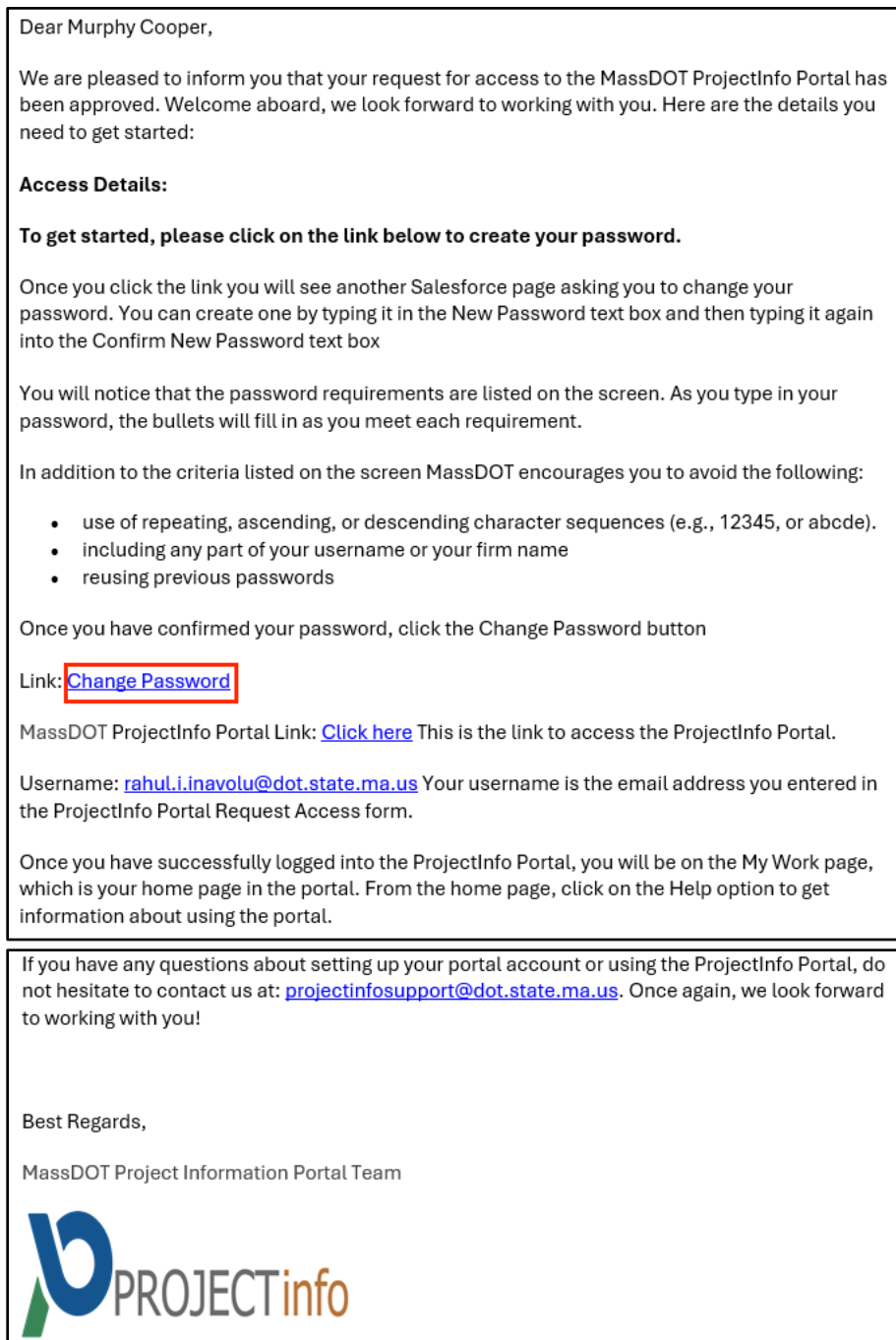
4.2.1 External Design Lead Contact Account Setup

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

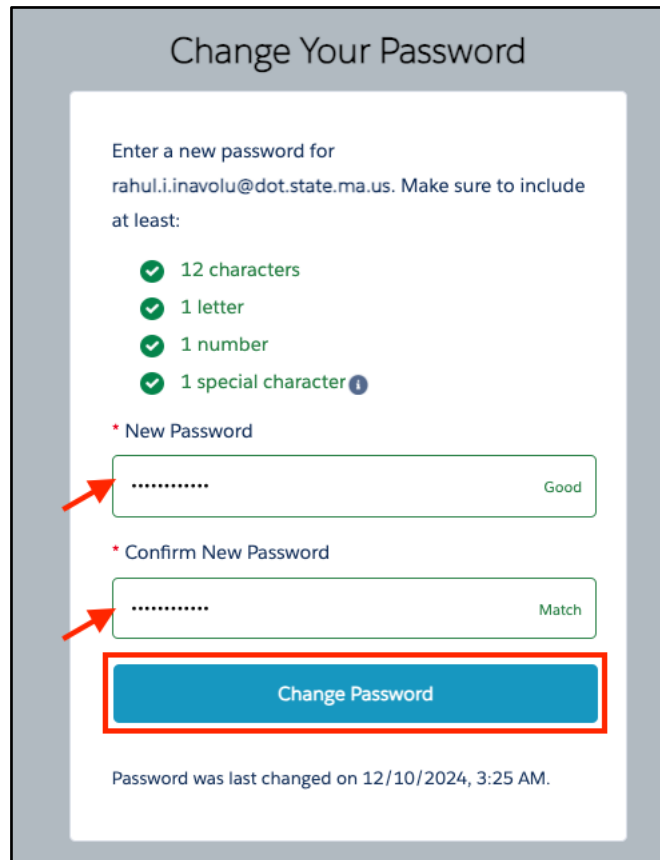
Note: Due to your firm security policies, emails from Salesforce may be directed to the spam folder if not found in the inbox.

To set up the password, follow the steps below:

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



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**.



The image shows a 'Change Your Password' form. At the top, it says 'Change Your Password'. Below that, it asks the user to 'Enter a new password for rahul.i.inavolu@dot.state.ma.us. Make sure to include at least:'. There are four requirements listed with green checkmarks: '12 characters', '1 letter', '1 number', and '1 special character'. Below these requirements are two password input fields. The first field is labeled '* New Password' and has a 'Good' status indicator. The second field is labeled '* Confirm New Password' and has a 'Match' status indicator. Both fields have red arrows pointing to them. Below the input fields is a blue button labeled 'Change Password' which is highlighted with a red rectangle. At the bottom, it says 'Password was last changed on 12/10/2024, 3:25 AM.'

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

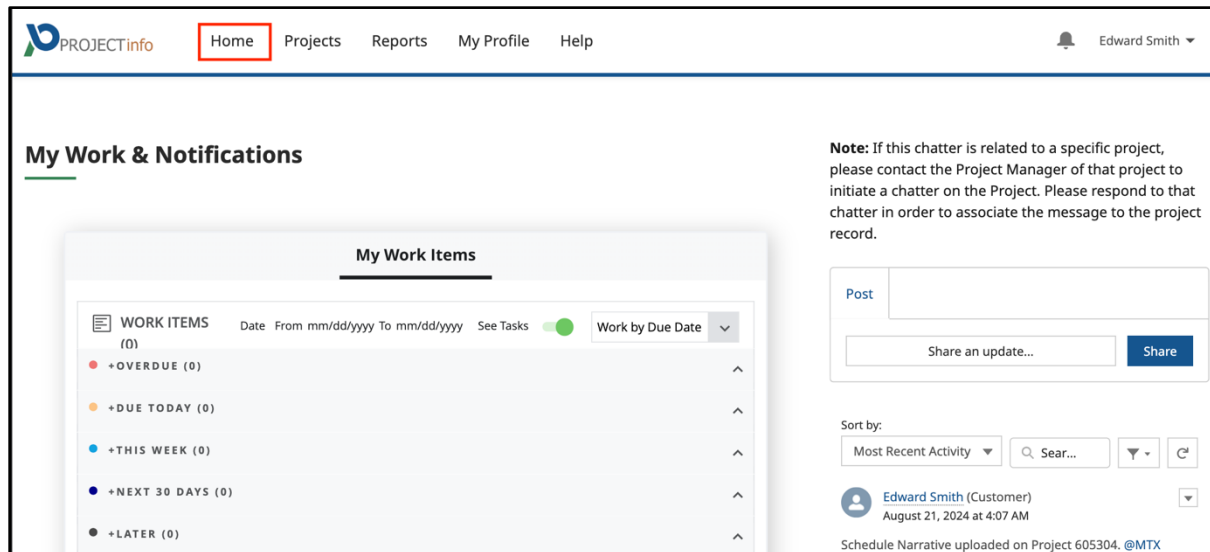
Password was last changed on 12/10/2024, 3:25 AM.

4.3. Home Tab

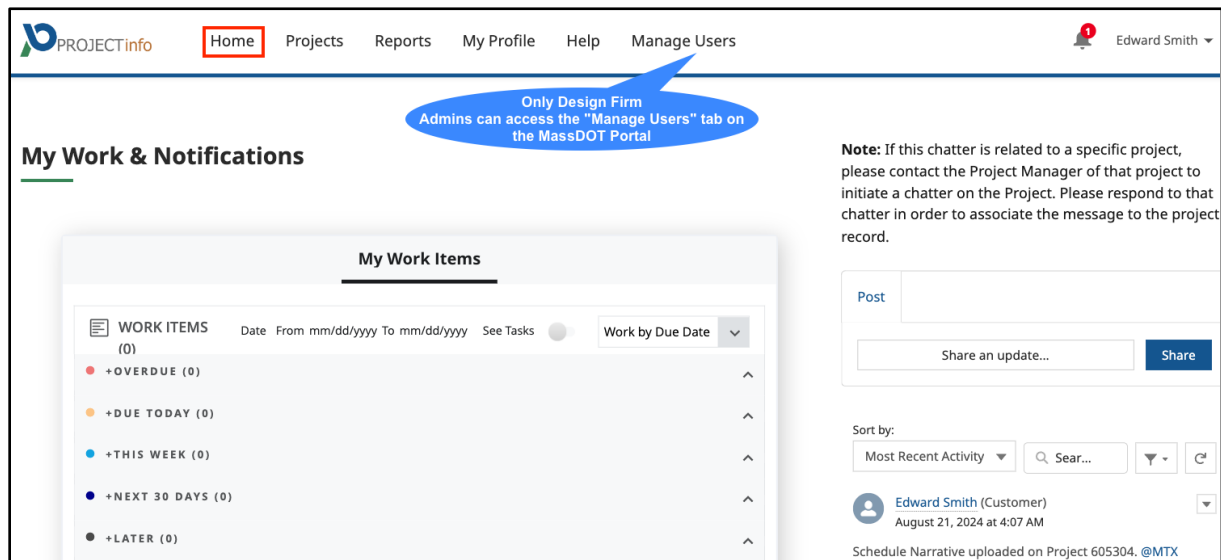
The image below illustrates the layout available for the External Design Lead Contact and Design Firm Admin respectively.

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

External Design Lead Consultant View:



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

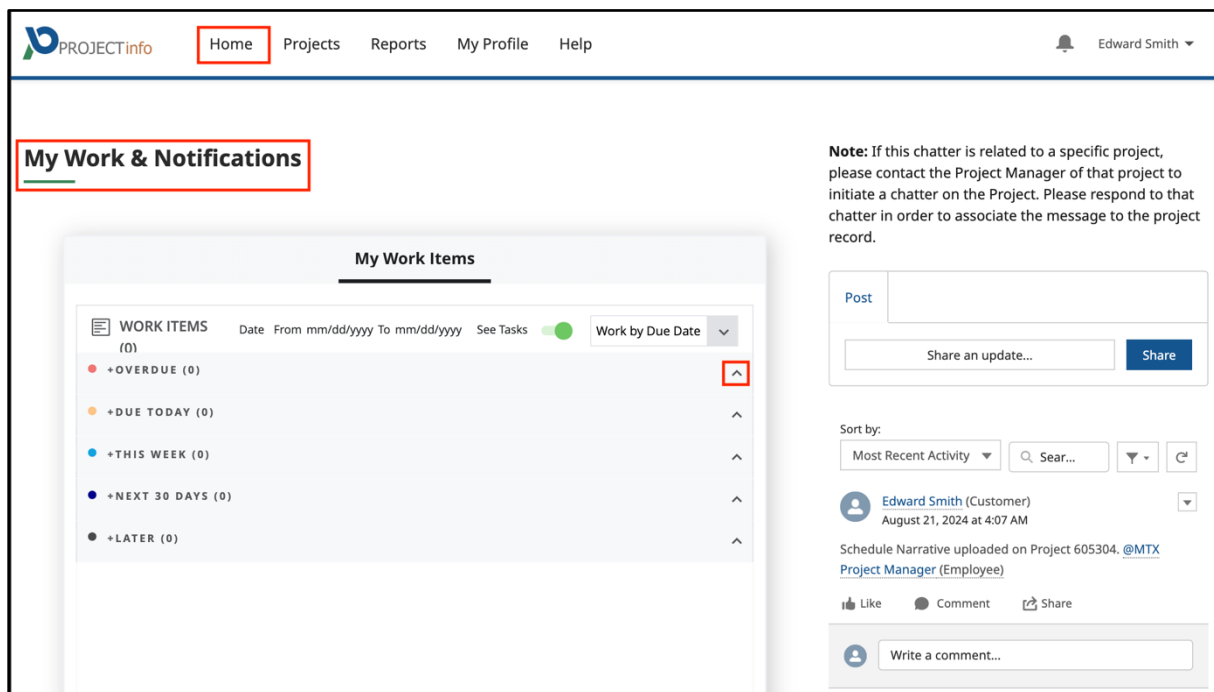


4.3.1 My Work Items

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**.

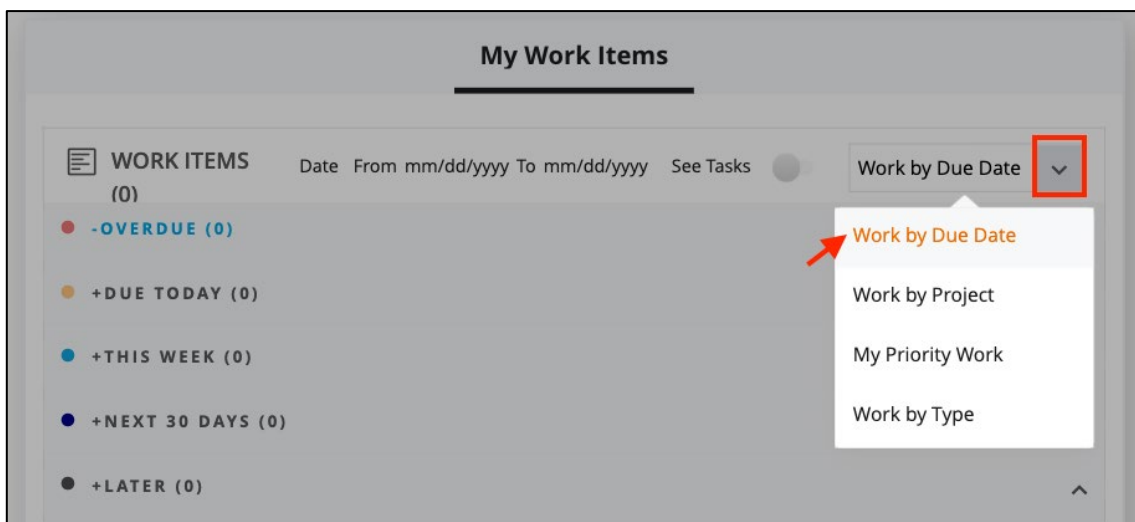
Note: Initially, no items are displayed in the **My Work Items** section. The My Work Items section serves as a starting checkpoint for the Users.



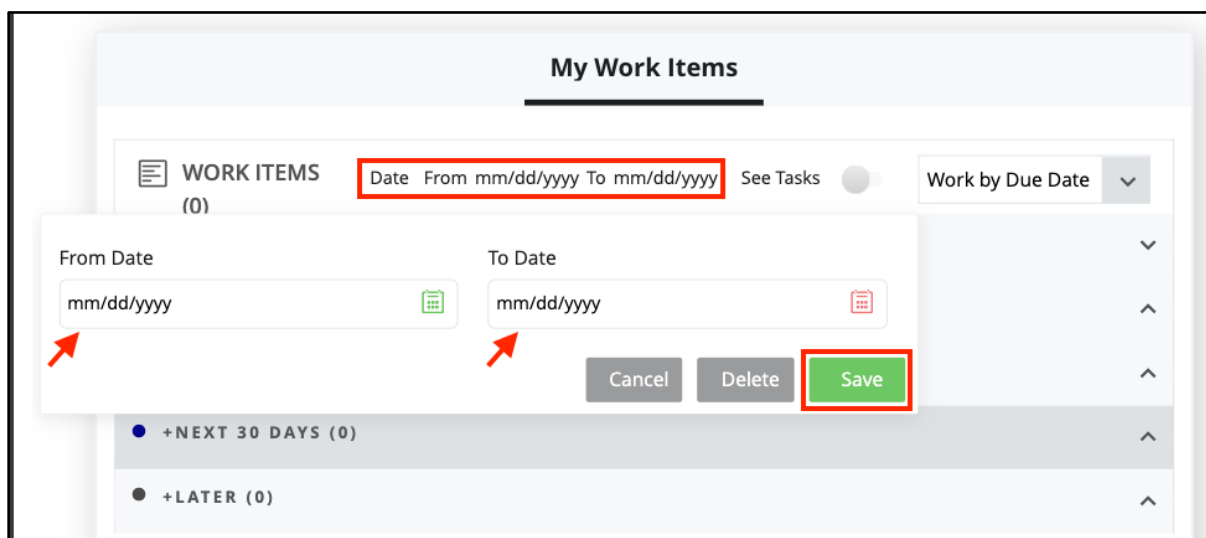
Users can customize **My Work Items** view by selecting the required type from the **Work by** drop-down list.

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

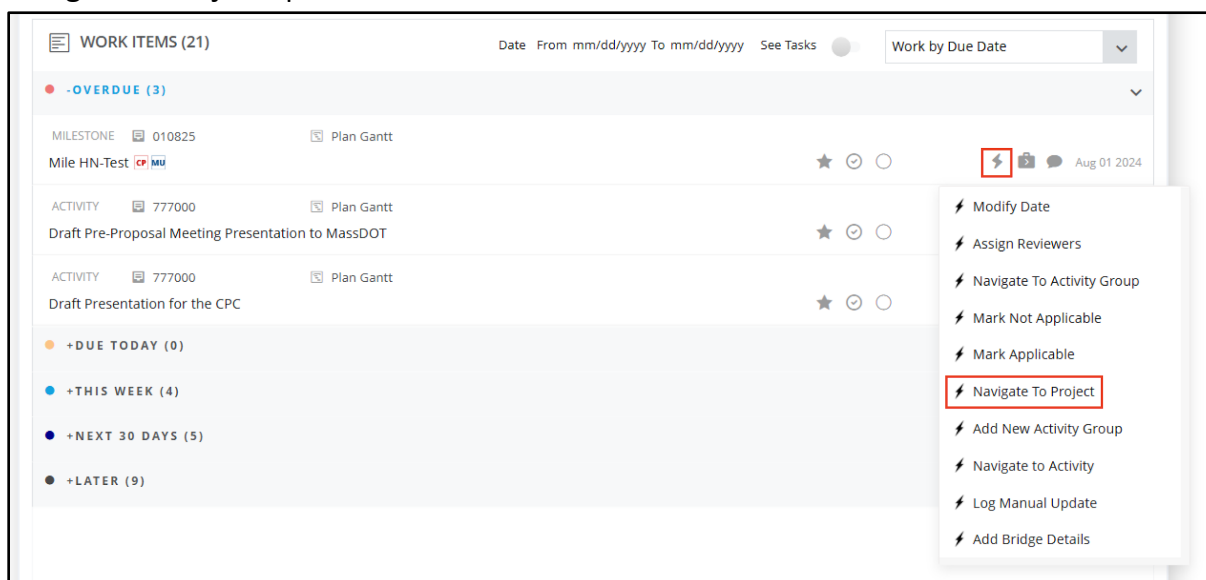
- **Work by Due Date:** Filtering Items based on period (as shown in this screenshot). Recommended Filter
- **Work by Project:** Filtering items associated with Projects that are assigned to a user
- **My Priority Work:** Filtering according to level of importance (Critical/High, Medium/Normal, Low, 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.

+DUE TODAY (0)

+THIS WEEK (0)

+NEXT 30 DAYS (0)

+LATER (0)

Sort by:

Most Recent Activity

Search...

Filter

Share

Edward Smith (Customer)

August 21, 2024 at 4:07 AM

Schedule Narrative uploaded on Project 605304. @MTX Project Manager (Employee)

Like Comment Share

Write a comment...

Edward Smith (Customer)

August 5, 2024 at 2:47 PM

@Aleksey N Belov (Employee) Draft RFQ docs have been uploaded

Like Comment Share

Write a comment...

Edward Smith (Customer)

Notifications

All Notifications

Printable View

0 items • Sorted by Project # • Filtered by All notifications • Updated 4 minutes ago

Search this list...

Settings

Grid

Refresh

Share

Filter

Project #	Description	Subject	Bell Notific...	Recipients ...	Created Da...

Notifications

All Notifications

Printable View

4 items • Sorted by Created By • Filtered by All notifications • Updated a few seconds ago

Search this list...

Settings

Grid

Refresh

Share

Filter

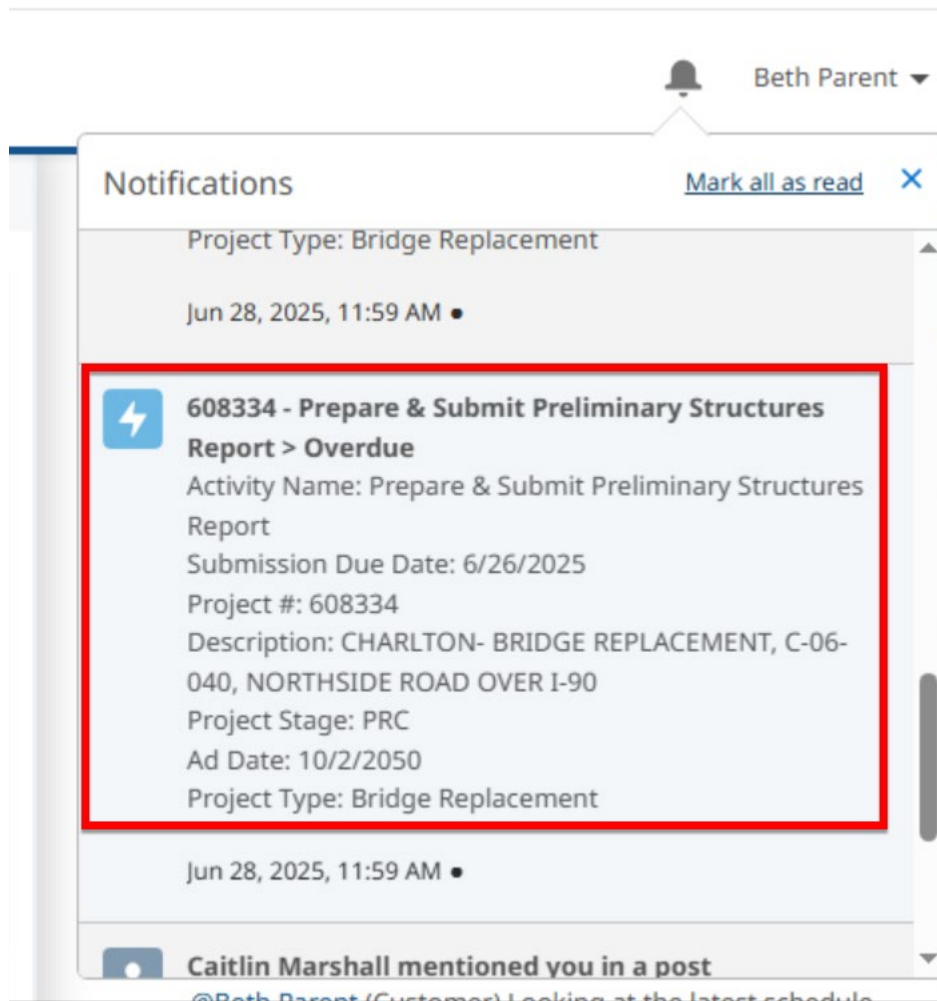
	Recipie...	Creat...	Pr...	D...	Subject	Bell No...	Recipie...	Created...
1	MTX PM, Q...	Project Ma...	909900		909900 Bri...	Review Bri...	Project Ma...	10/21/2024...
2	MTX PM, Q...	Project Ma...	909900		909900 Ba...	Review & A...	Project Ma...	10/21/2024...
3	MTX PM, Q...	Project Ma...	909900		909900 Bri...	Review Bri...	Project Ma...	10/21/2024...
4	MTX PM, Q...	Project Ma...	909900		909900 Bri...	Review Bri...	Project Ma...	10/21/2024...

Refresh

Like Comment Share

Write a comment...

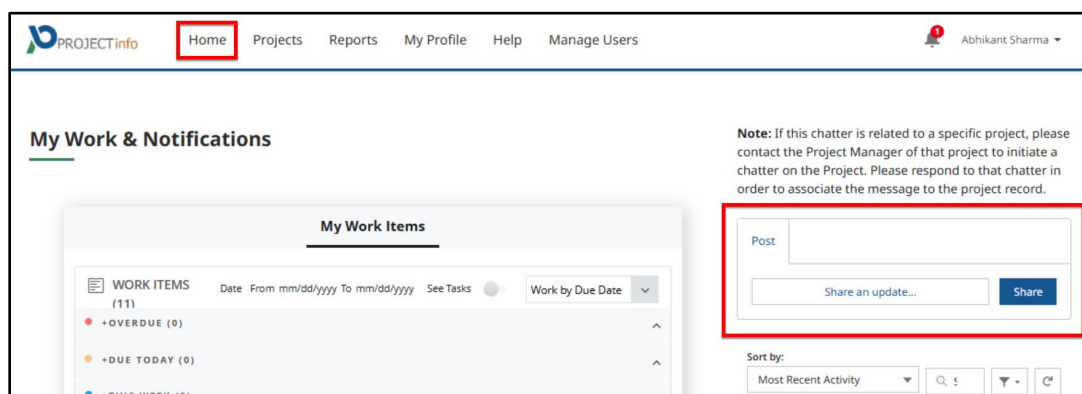
Users can also view the notification alerts from the Bell Notification button.



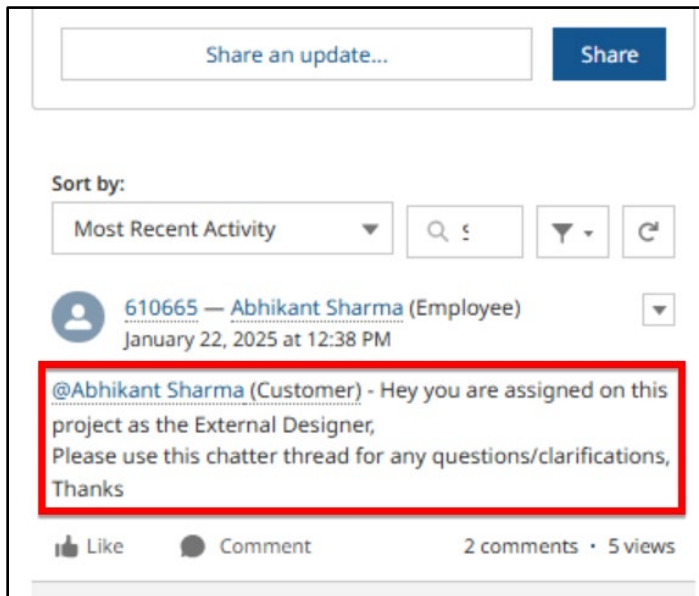
4.3.3 Chatter

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

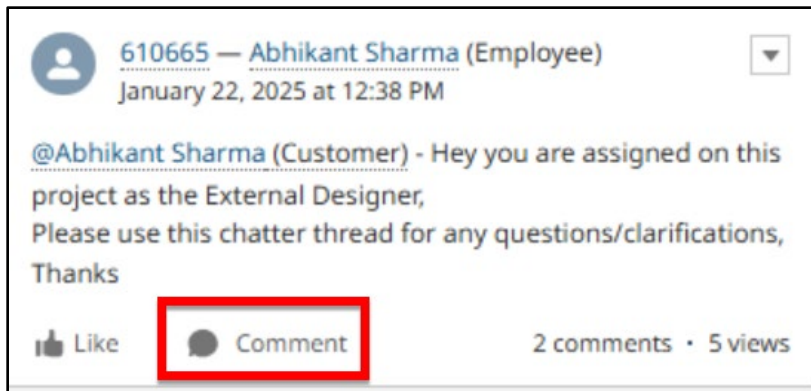
1. Go to the **Home** Tab and Locate Chatter section on the right side of the page.



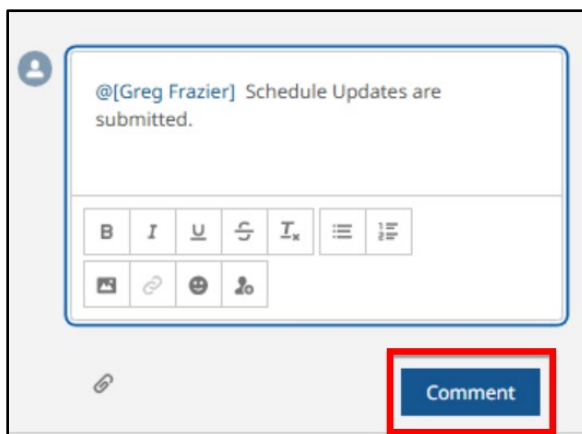
2. Scroll down and locate a **Chatter** posted by the Project Manager regarding Project assignment.



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	1

4.4.2 External Design Lead Contact Requesting Access to a Project

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

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

The screenshot shows the PROJECTinfo portal interface. The top navigation bar includes 'Home', 'Projects' (highlighted with a red box), 'Reports', 'My Profile', and 'Help'. Below the navigation bar, the 'My Projects' section is active, and 'All Projects (My Firm)' is selected. A message box states: 'To request access to a project below, please click on the Project Manager's email and provide the required information'. Below this message is a table with columns: Project #, Description, Project Manager, Project Manager Email, District, Municipality, Ad Date, and Office Estim. The first row of the table shows project 610665, 'STONEHAM- INTERSECTION IMPROVEMENTS AT ROUTE 28 (MAIN STREET), NORTH BORDER ROAD AND SOUTH STREET', managed by Ryan Schorr. The 'Project Manager Email' column for this project contains the email 'ryan.w.schorr@dot.state.ma.us', which is highlighted with a red box and has a red arrow pointing to it.

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.

The screenshot shows an Outlook 'Message (HTML)' window. The 'To' field contains 'Schorr, Ryan W. (MTX)'. The 'Subject' is 'ProjectInfo #610665 - External User Request to be added to Project Team'. The message body contains the following text:

Project #: 610665
Description: STONEHAM- INTERSECTION IMPROVEMENTS AT ROUTE 28 (MAIN STREET), NORTH BORDER ROAD AND SOUTH STREET
Design Firm Name: Vanasse Hangen Brustlin, Incorporated
Role: External Designer

Provide description of your role on the project and any additional information below.

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

4.4.3 My Projects

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

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

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

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

The screenshot shows the 'PROJECTinfo' web application. The 'Projects' tab is selected in the navigation bar. Under 'My Projects', there is a table of assigned projects. The first project is highlighted with a red box.

Project #	Description	Project Manager	District	Municipality	Ad Date	Office Estimate	Project Manag...
1 605304	HAVERHILL- BRIDGE REPLACEMENT, H-12-007 & H-12-025, BRIDGE STREET (SR 125) OVER THE MERRIMACK RIVER AND THE BRADFORD RAIL TRAIL	MTX Project Manager	District 4	HAVERHILL	11/23/2024	\$128,199,069.00	✉ dotprojectinform...
2 000787		MTX Project Manager					✉ dotprojectinform...

The user is directed to the selected Project.

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. 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**.

PROJECTinfo Home Projects Reports My Profile Help Manage Users

Abhikant Sharma

610665 STONEHAM- INTERSECTION IMPROVEMENTS AT ROUTE 28 (MAIN STREET), NORTH BORDER ROAD AND SOUTH STREET

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:
 Designer Readiness Date: 9/25/2026
 Contract Cost: \$1,485,001.00
 TFP: \$1,595,001.10
 STIP Cost: \$0.00

PIF 11/22/2019 PRC 1/29/2025 (Approved) Pre-25% 2/3/2025 25% Design 2/6/2025 75% Design 100% Design Final Design Advertising Construction

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

Schedule Status Info

- 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.

Details Search Schedule **Live Schedule** Edit Schedule Initiation & Sco...

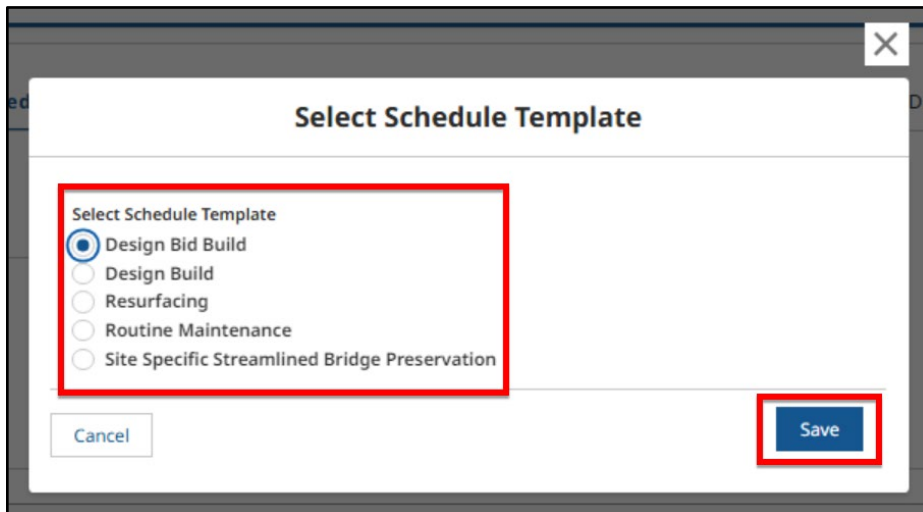
Schedule Status Info

Schedule Status

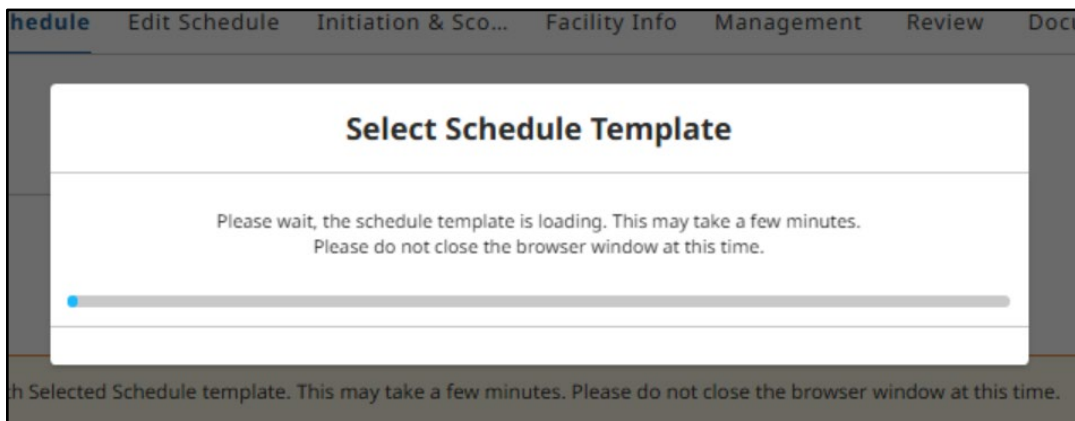
Select Schedule Template

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

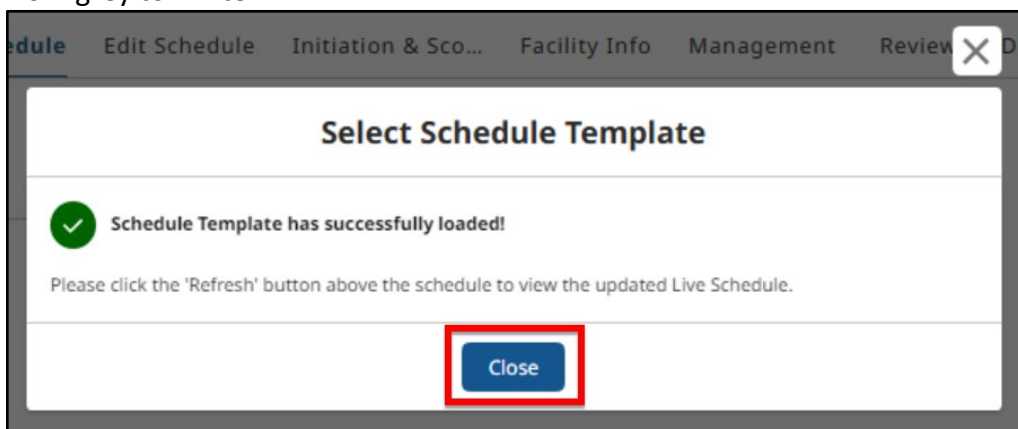
- Click on the radio button next to the desired Schedule Template and click the **Next** button. **Note:** In this example the Design Bid Build Template is selected. The steps that follow are the same regardless of the Selected Template.



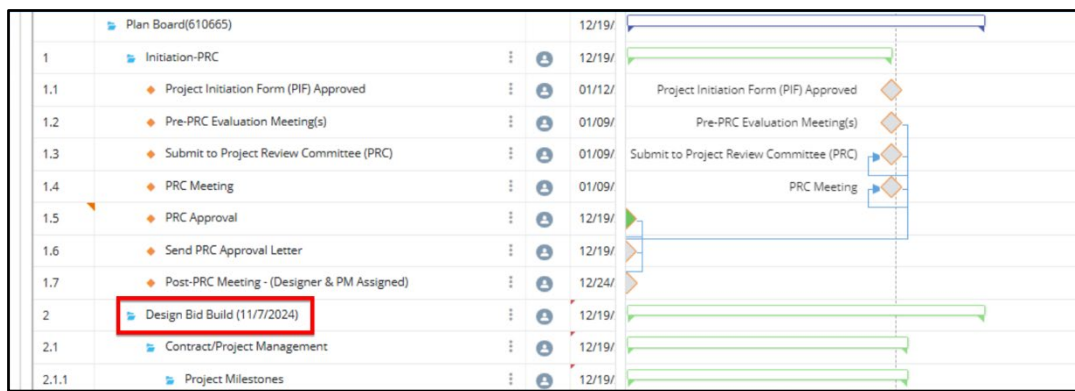
6. A progress bar is displayed while the schedule template is loading.



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**.



4.6. Adding Combo Submission

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

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

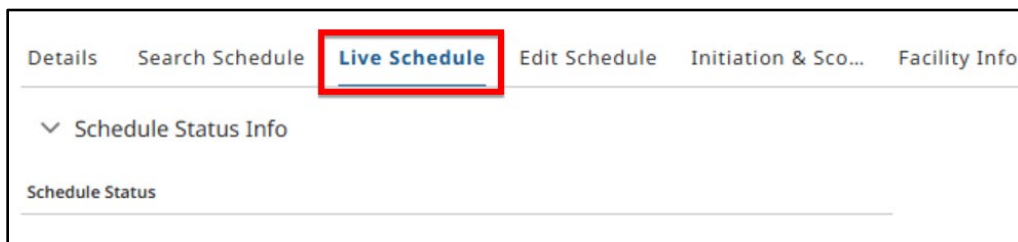
An **Add Combo Submission** is a combined submission of different project stages, such as 25% and 75% design. When a combo submission is completed, the application automatically updates the **Project Stage** to the higher of the two stages.

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

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

To add a **Combo Submission**,

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



The screenshot shows a web interface with several tabs: 'Details', 'Search Schedule', 'Live Schedule' (highlighted with a red box), 'Edit Schedule', 'Initiation & Sco...', and 'Facility Info'. Below the tabs, there is a section titled 'Schedule Status Info' with a dropdown arrow. Underneath, there is a 'Schedule Status' field with a horizontal line for input.

3. Click **Add Combo Submission**

Details Search Schedule **Live Schedule**

▼ Schedule Status Info

Schedule Status

Add Combo Submission

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

2/3/2023 2/6/2023

ned Doc

Add Combo Submission

* Select one:

☐ Add 25%/75% Design Package

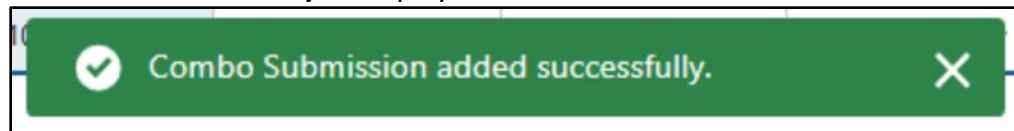
☐ Add 75%/100% Design Package

☐ Add 100%/PS&E Design Package

Cancel Save

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.

4.7. Edit Schedule for Baseline Creation

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

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

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

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

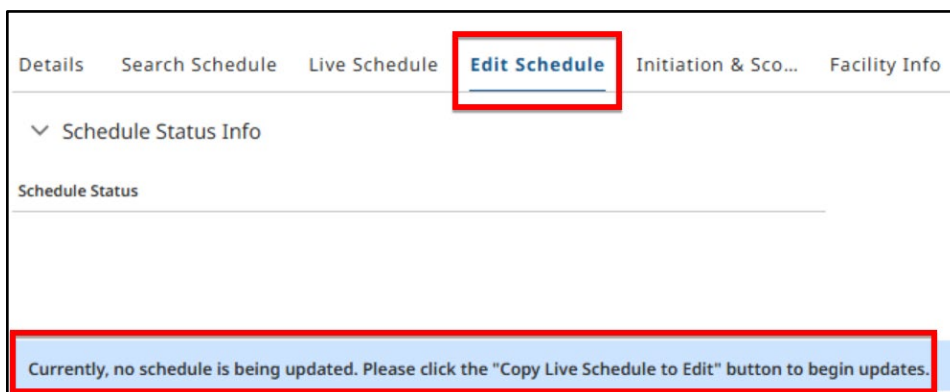
4.7.1 Copying a Live Schedule

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

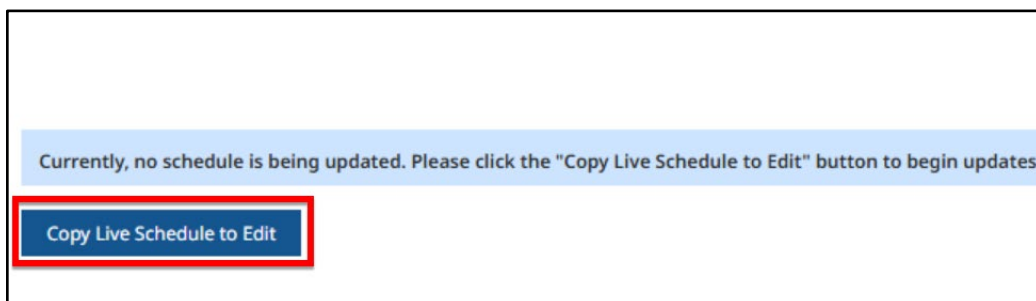
To make a copy of the **Live Schedule**, follow the steps below:

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

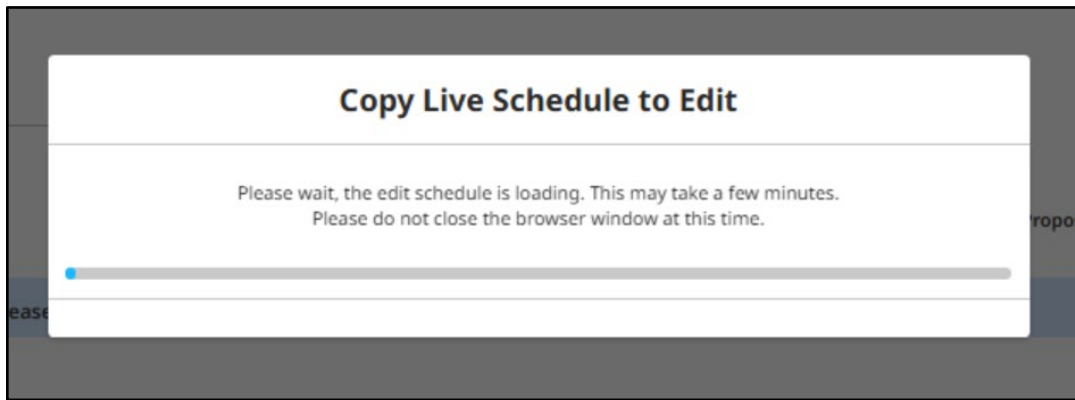
Note: If no schedule is currently being updated, an alert will be displayed on the page.



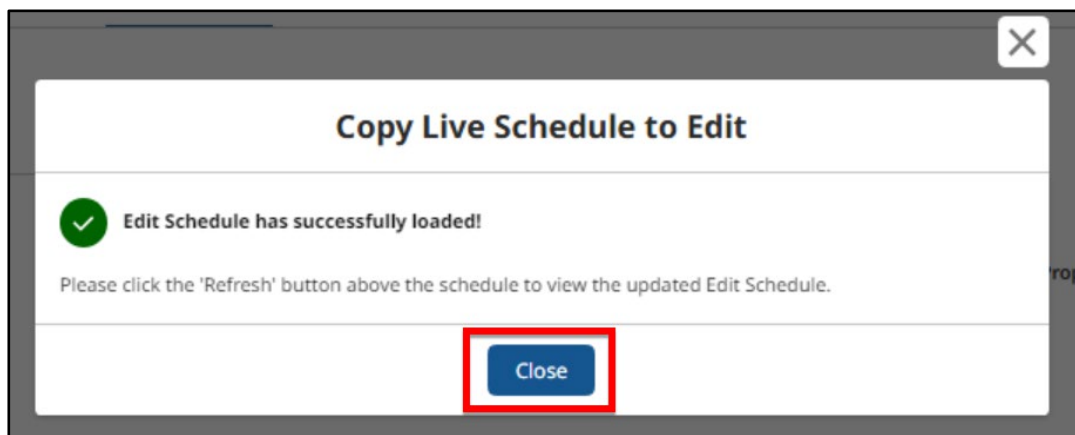
3. Click **Copy Live Schedule to Edit**.



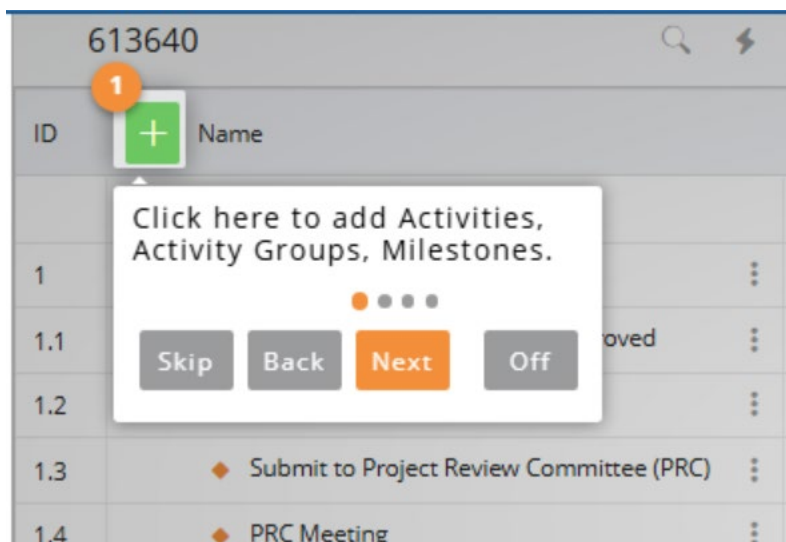
4. A progress bar is displayed while the Copy of the Live Schedule under the Edit Schedule is being generated.



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.



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

610665 - Edit Schedule

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

Details	Search Schedule	Live Schedule	Edit Schedule	Initiation & Sco...
Schedule Status Info				
Schedule Status		02/06/2025 - Copy of Live Schedule added to Edit Schedule tab		

4.7.2 Viewing and Customizing the Edit Schedule

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

The frequently used customizable features are described below:

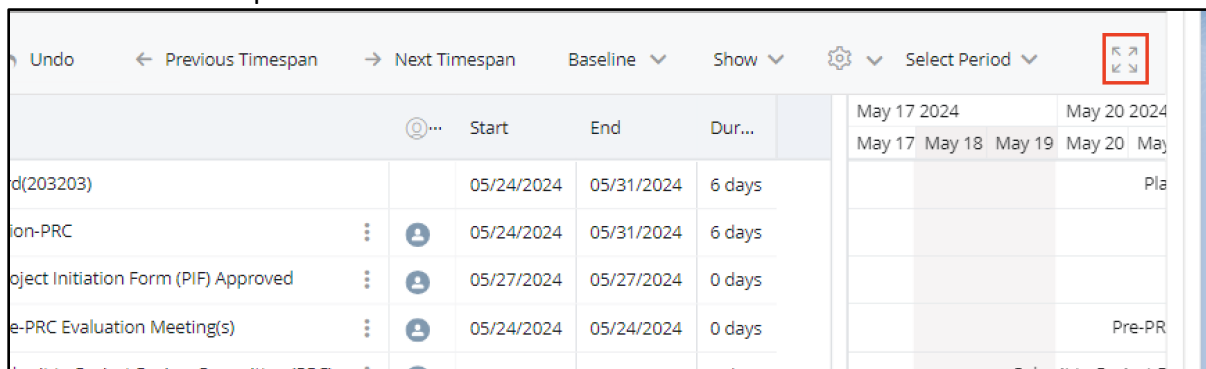
Refresh button:

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

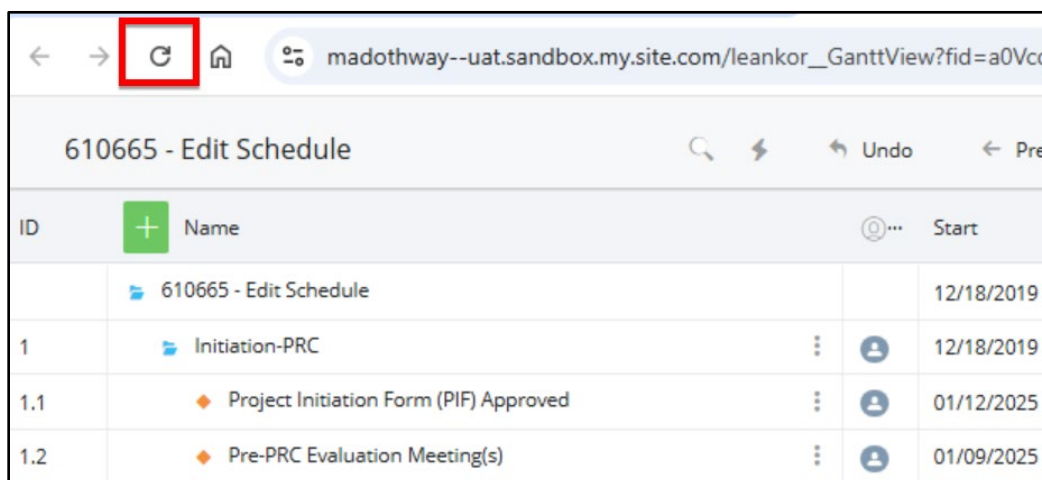
Edit Schedule	Initiation & Sco...	Facility Info	Management	Review	Documents	Communication	More
f Live Schedule added to Edit Schedule tab							
<div>View Proposed Schedule Edits <input type="checkbox"/> Disabled</div> <div>View/Upload Schedule Narrative</div> <div>Refresh</div>							

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.





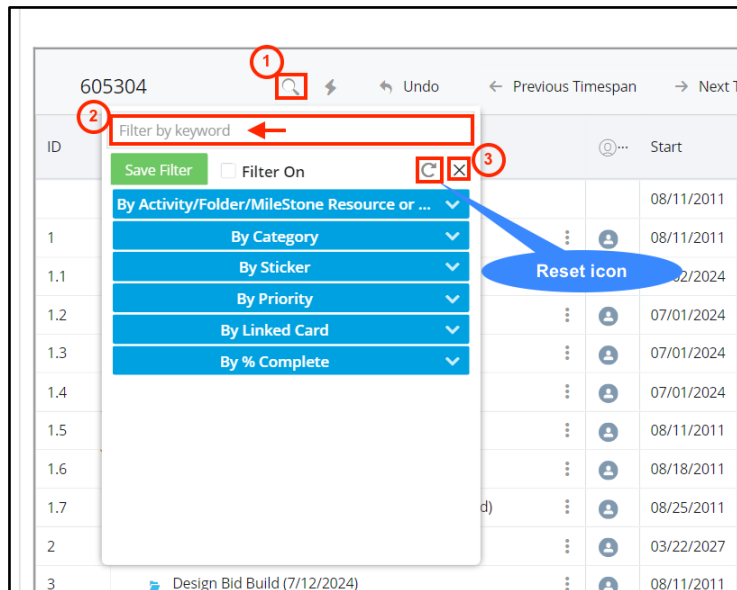
Note: In Expanded View, the **Reload this page** icon is at the top-left corner. Hovering over the icon will also indicate this. Click it to refresh the screen.



Filter Activities/Milestones by Key Words:

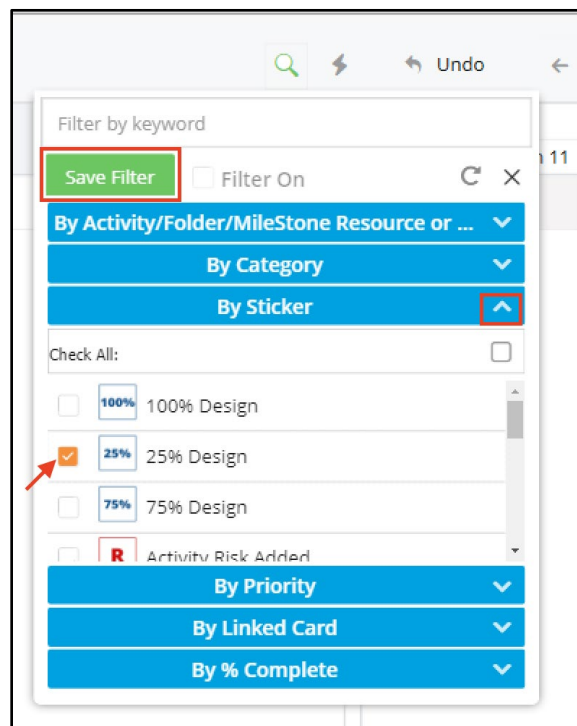
Users can filter and search for desired Activities or Milestones using keywords.

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.

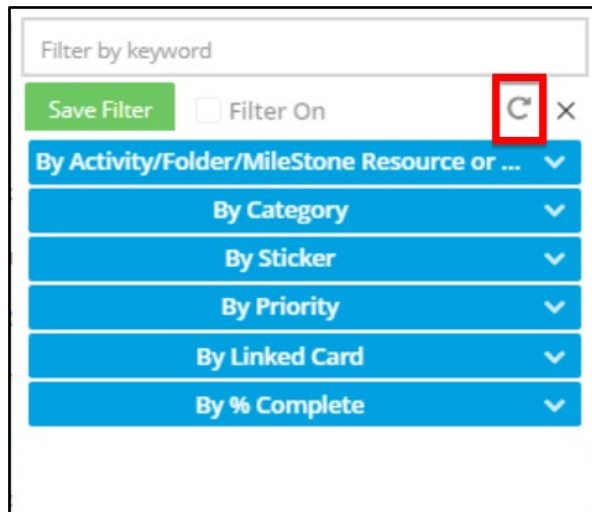


Note:

- 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:

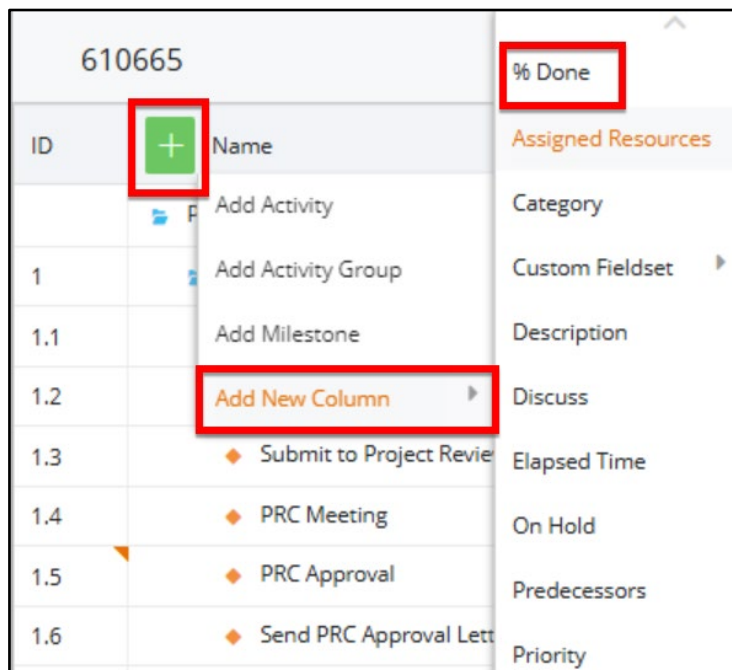


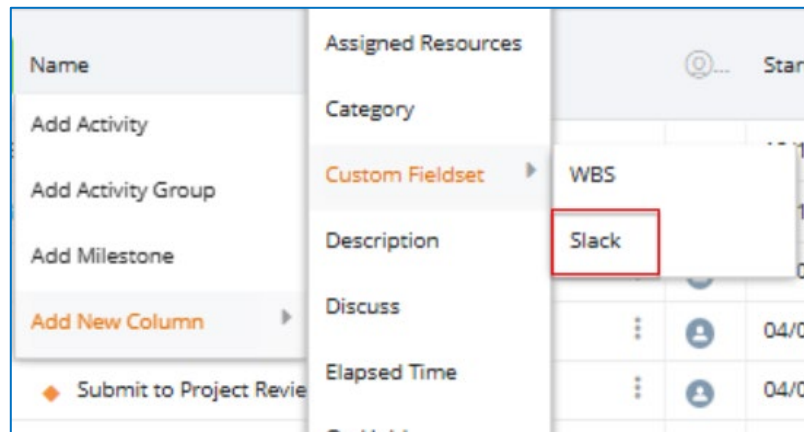
- Users can also reset the filters after use, by clicking on the **Reset Icon**



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.



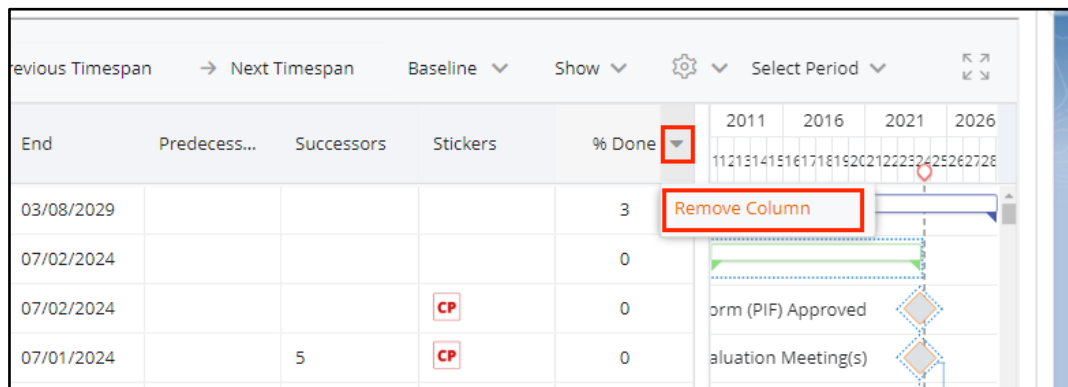


3. The selected column will be displayed on the Schedule.

Name	Assigned Resources	Category	Custom Fieldset	Description	Discuss	Elapsed Time	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

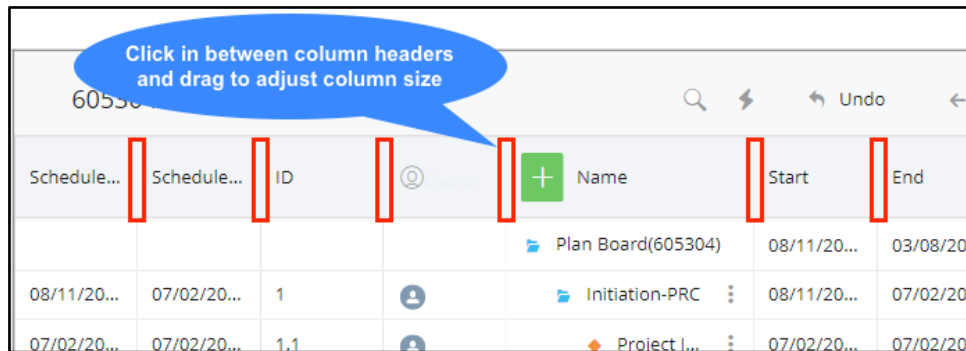
Removing Columns:

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

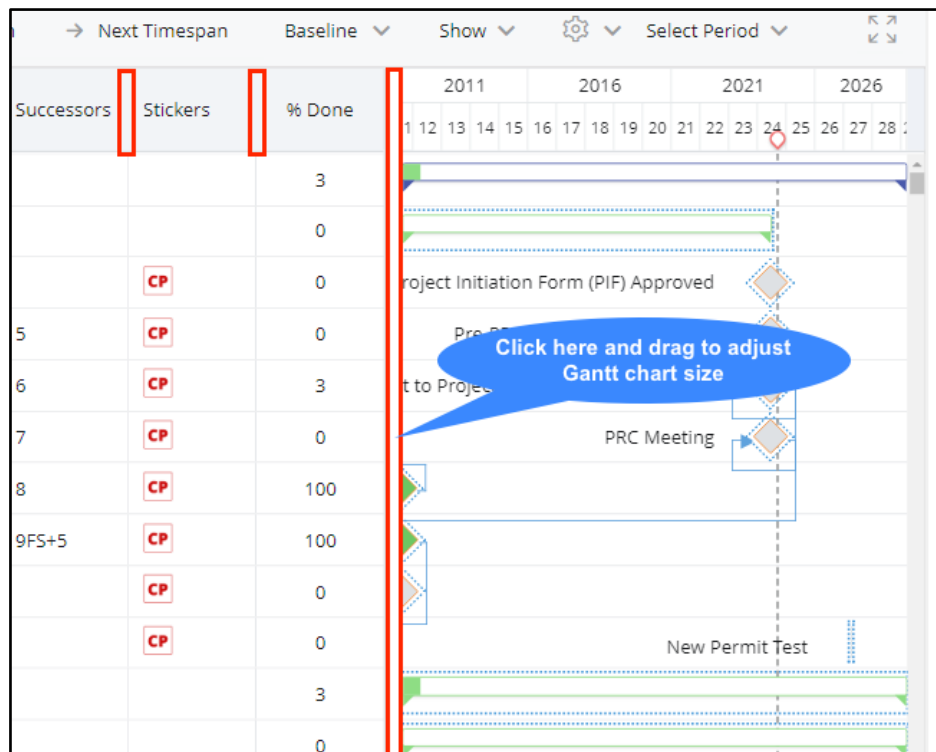


Adjusting column/Gantt chart size:

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

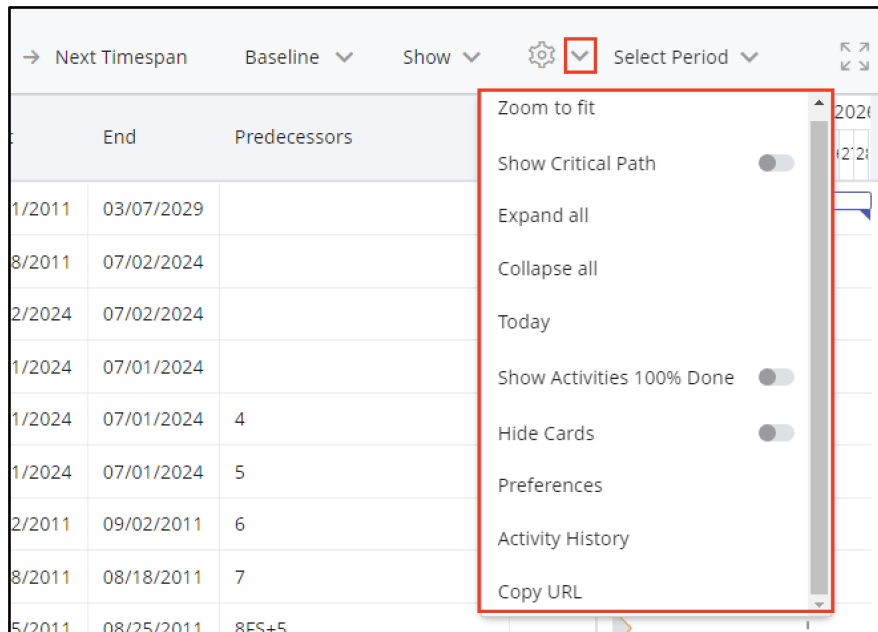


2. Similarly, click on the Gantt chart separation line and drag (Left/Right) to adjust the Gantt column size.



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.

4.7.3 Proposing Updates for Baseline Schedule

Note: To propose updates on the **Edit Schedule**, it is recommended to open the **Edit Schedule** in the **Expanded View**. Refer to [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 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.

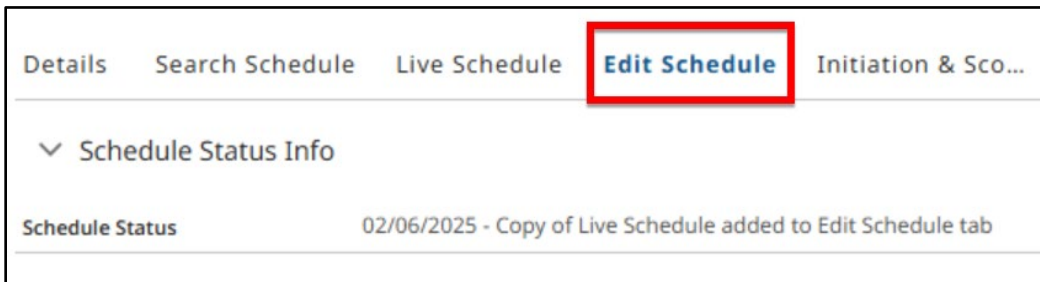
4.7.3.1. Updating Completed Activities

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

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

To update **Completed Activities**:

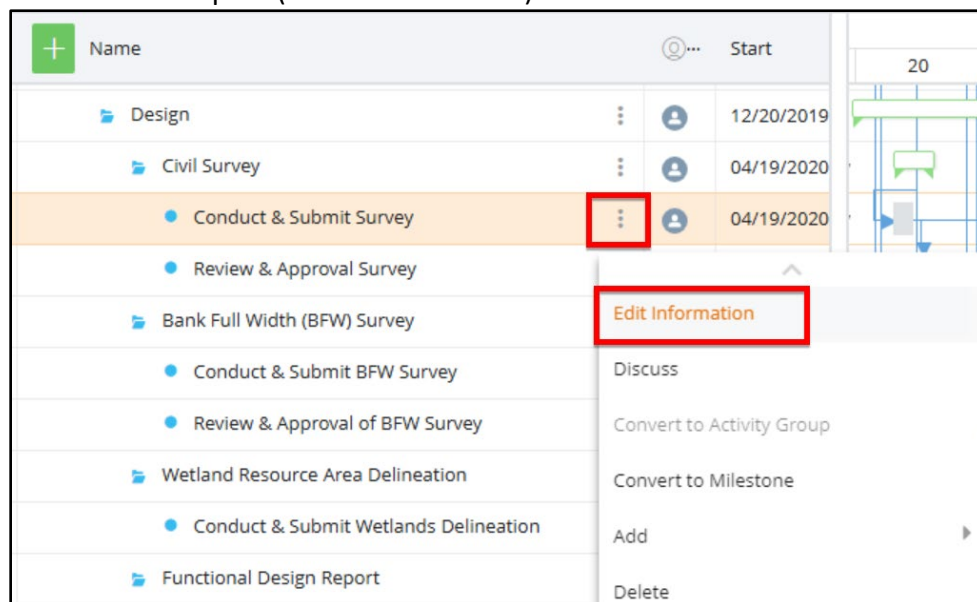
1. Go to the **Project**.
2. Go to **Edit Schedule**



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

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

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



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

Conduct & Submit Survey

Activity Info

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:

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

< April 2020 >

M	T	W	T	F	S	S
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	1	2	3
4	5	6	7	8	9	10

Today

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

Conduct & Submit Survey

Activity Info

Status

Log Time

Risk

Subscribers

Custom Fields

Resource

Activity Mode

Stickers

Scheduling Mode: Normal

Actual Effort: 0 days

Manually Scheduled: ☐

Delete Save

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

Conduct & Submit Survey

Activity Info

Status

Log Time

Risk

Subscribers

Custom Fields

Resource

Activity Mode

Stickers

Scheduling Mode: Normal

Actual Effort: 0 days

Manually Scheduled: ☒

Delete Save

Note:

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

4.7.3.2. Marking Activities/Activity Groups as Not Applicable

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

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

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

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

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

For detailed steps on updating dependencies, refer to the [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**.

ID	Name
2.3.11	25%/75% Design Package
2.3.11.1	Prepare and Submit 25%/75% Design Package
2.3.11.2	All Sections Review 25%/75% Design Comments sent to DE
2.3.11.3	Prepare 25%/75% Design Responses
2.3.11.4	Schedule and Hold Comment Resolution Meeting @25%/75% (Full Team)
2.3.12	75% Design Package
2.3.12.1	Prepare & Submit 75% Design Submission
2.3.12.2	Review 75% Design Submission & Comments to DE
2.3.12.3	Prepare 75% Design Responses
2.3.12.4	Schedule & Conduct Comment Resolution Meeting @75% (Full Team)

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

The screenshot shows the 'Edit Schedule' interface. On the left, there is a list of design packages. The '75% Design Package' is highlighted in orange. To its right, a context menu is open, showing options like 'Add', 'Delete', 'Indent', 'Outdent', 'Clone', 'External Dependency', and 'Quick Actions'. The 'Quick Actions' option is highlighted with a red box. Below the list, there is a table with columns for dates and a user icon. The table contains three rows of data.

25%/75% Design Package			
• Prepare and Submit 25%/75% Design Package			
• All Sections Review 25%/75% Design Comments sent to DE			
• Prepare 25%/75% Design Responses			
• Schedule and Hold Comment Resolution Meeting @25%/75% (Full Team)			
75% Design Package			
• Prepare & Submit 75% Design Submission			
• Review 75% Design Submission & Comments to DE			

	02/12/2022	05/12/2022	
	02/12/2022	04/12/2022	
	03/14/2022	04/12/2022	

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

The screenshot shows the 'Quick Actions' menu. The 'Mark Not Applicable' option is highlighted with a red box. The menu also includes options like 'Discuss', 'Add', 'Delete', 'Indent', 'Outdent', 'Clone', 'External Dependency', 'Log Manual Upda...', and 'Add Bridge Details'.

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

The screenshot shows the 'Mark Activities Not Applicable' popup. The text 'Activities marked Not Applicable.' is displayed. The 'Finish' button is highlighted with a red box.

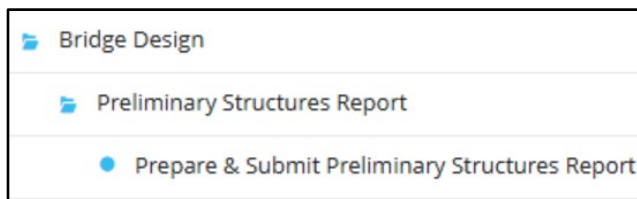
When an Activity Group/Activity is marked as Not Applicable, A **Not Applicable(N/A)** Sticker is added to the Activities/Activity Group. User may need to click refresh for the N/A sticker to appear on their Schedule.

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

Parent Activity Group →

Activity Group →

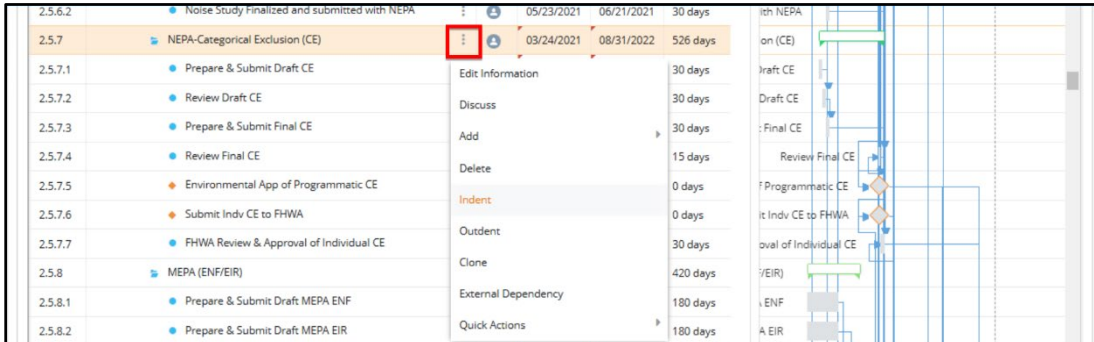
Activity →



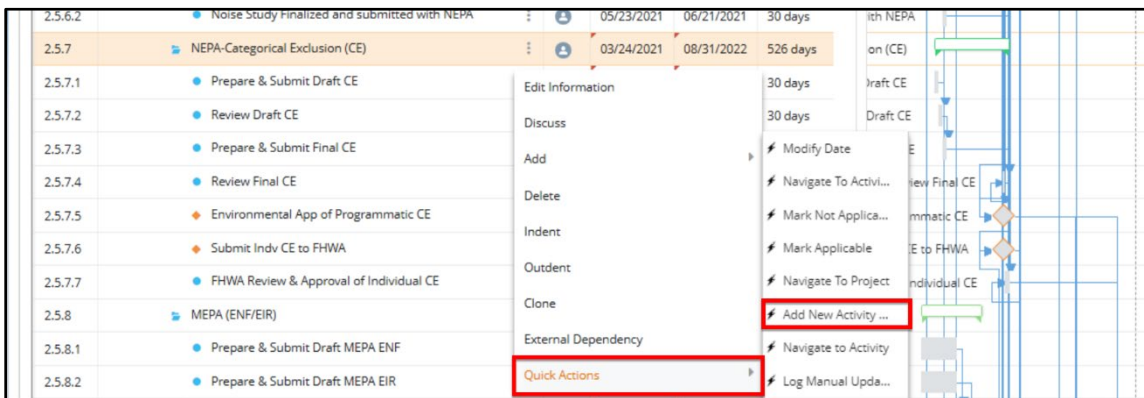
4.7.3.3. Adding Activity Groups

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

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



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

▼ Add New Activity Group

* New Activity Group

New Activity Group

* Activities

☒ Prepare

☒ Submit

☒ Review

☐ Approval

Start Date

Activity Review Discipline

☐ Design

☐ Traffic & Safety

☐ Bridge

☐ Utilities & Constructability

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

Activity Review Discipline

☐ Design

☐ Traffic & Safety

☐ Bridge

☐ Utilities & Constructability

☒ Environmental

☐ Right-of-Way

* Stage Sticker

--None--

WBS Code

Event Code

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

☐ Utilities & Constructability
☒ Environmental
☐ Right-of-Way

* Stage Sticker
 Stage = 025%

WBS Code

Event Code

Next

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

2.5.8	New Activity Group		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.

Activity Info

Category: Default

Title: Review Survey

Description: HWY.303.030

Assign an Owner: Pankaj Dwivedi

Priority: None

Start Date: Mar 26 2012

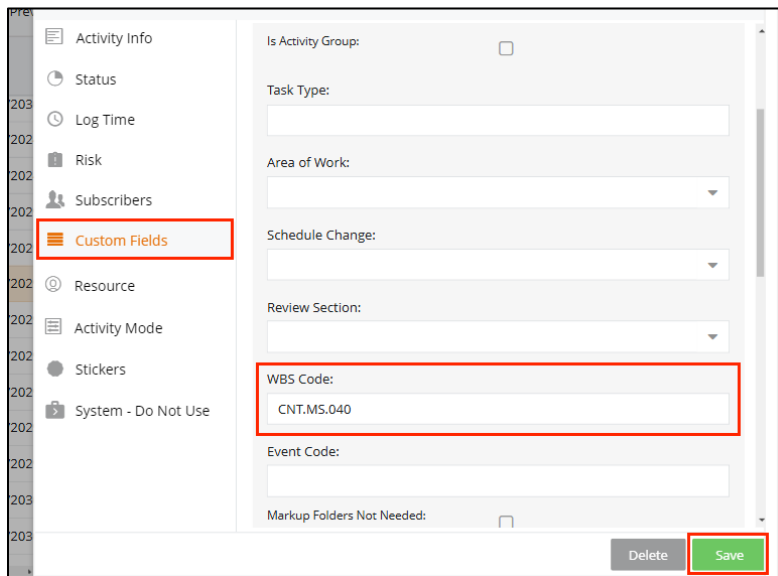
Due Date: Jun 15 2012

Duration: 60 days

Delete Save

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

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



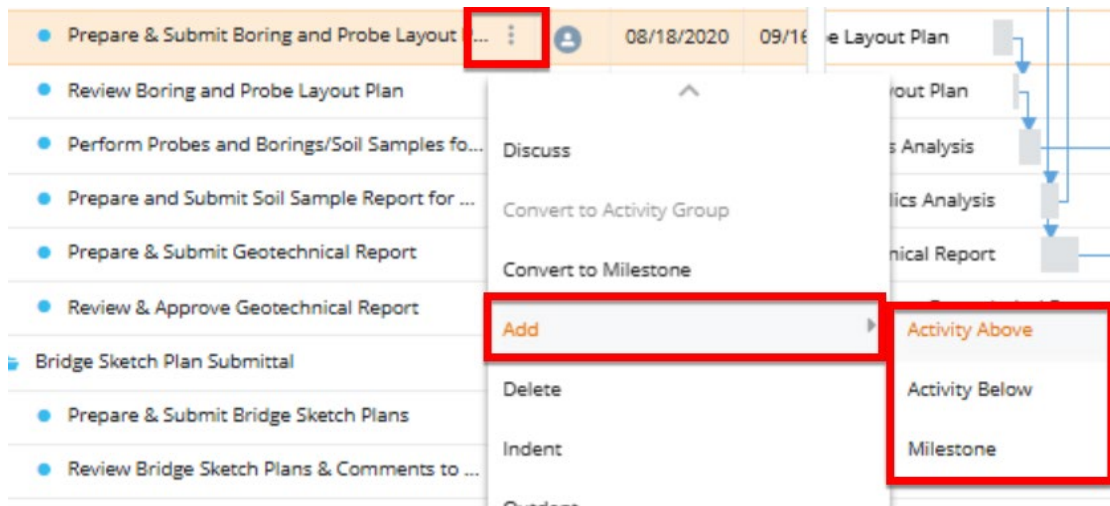
Note: The **WBS Structure** is intentionally developed to align with the **Area of Work** and the **Division/Subdivision of Work** as defined in the Scoping Workbook. **Do not modify the WBS Structure** under any circumstances. For questions regarding WBS codes for new Activity Groups, contact Project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

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

4.7.3.4 Adding a new Activity [after an existing Activity \(Activity, Milestones\)](#)

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

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



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

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

4.7.3.5 Editing Dependencies

Prerequisite: Columns for **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	Start	End	Duration	% Done	Predecessors	Successors	S
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 t...	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

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

me		Start	End	Duration	% Done	Predecess...	Success...
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...

- 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:

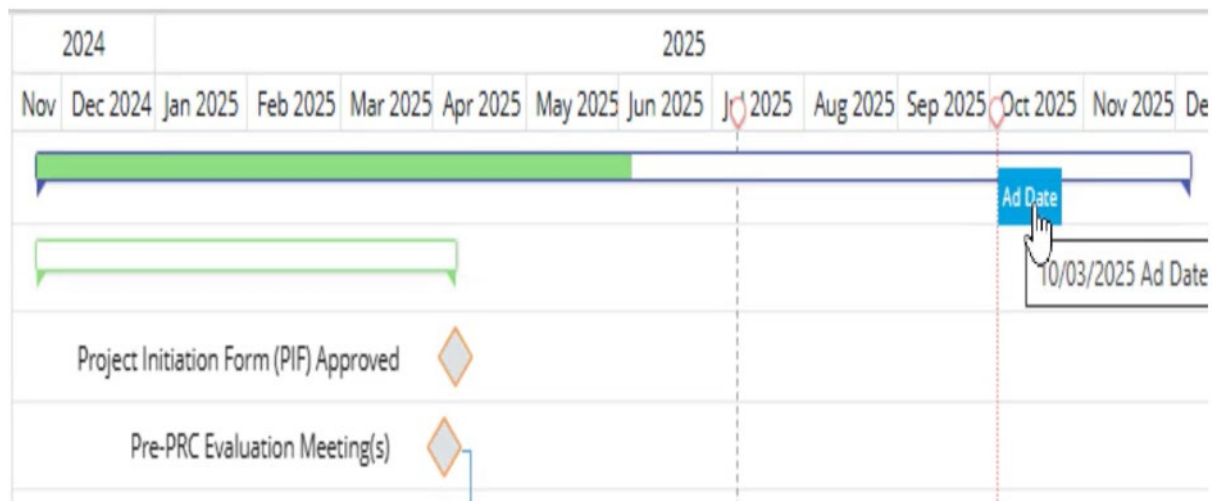
Subsurface Utility Exploration	...	08/17/2020	10/15/2020	60 days	0	31	80:91:86
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After updating the **Predecessor** and **Successor**, the dates automatically adjust based on the new predecessors and successors.

4.7.3.6 Reviewing Ad Date on the Edit Schedule Gantt Chart

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

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



4.7.3.7 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...
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

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 di
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.

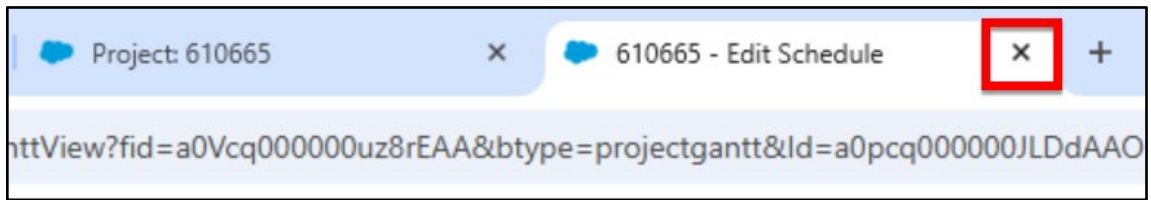
2.5.19	Hazardous Materials	04/22/2021	06/13/2022	418 days
2.5.19.1	Complete Env. Assessment / Initial Inclusion of Spec. ...	04/22/2021	06/21/2021	61 di
2.5.19.2	Submit for Hazmat Review	06/21/2021	06/21/2021	0 days

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.

4.7.4 Logging Manual Update

Prerequisites:

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



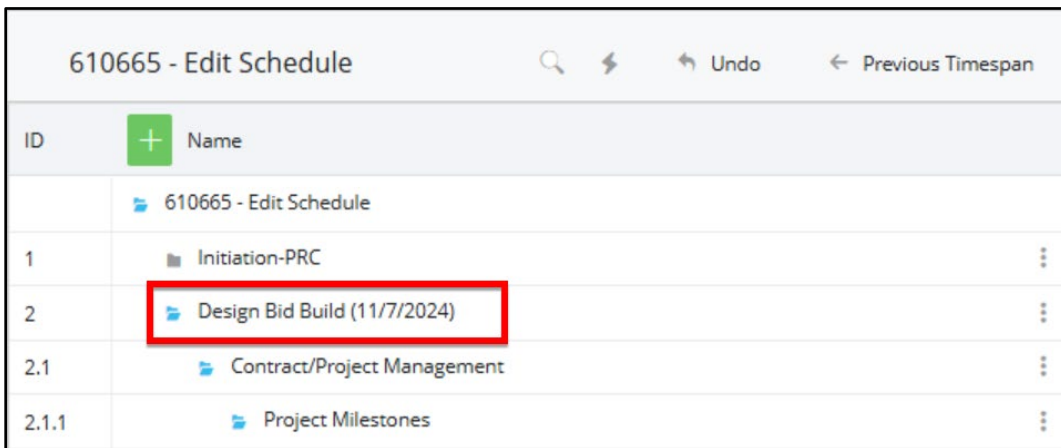
2. Click on the **Refresh** button under the **Edit Schedule** tab.

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.

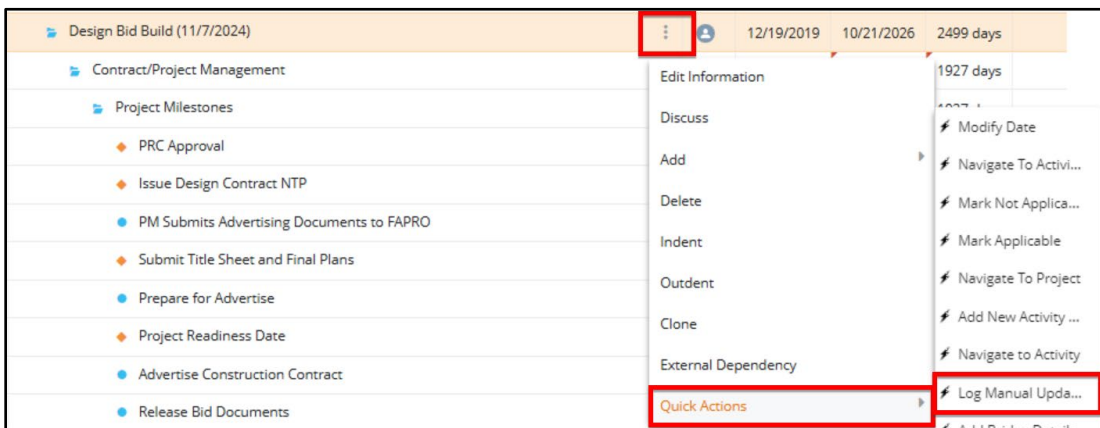
Log Manual Update the Baseline Schedule before submitting to the Project Manager.

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.



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



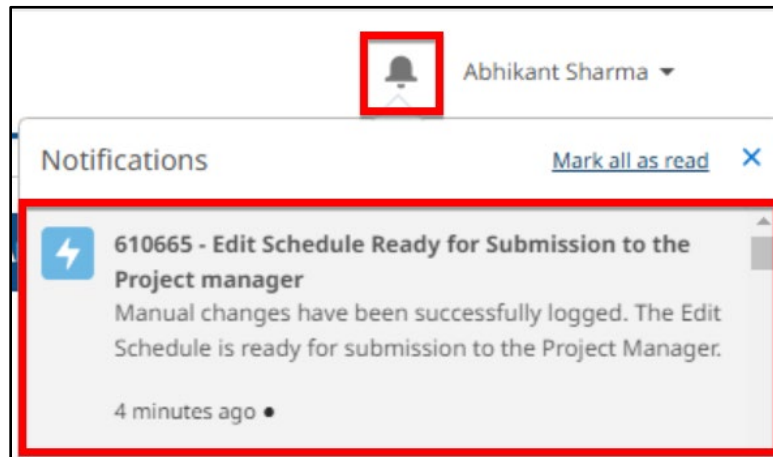
5. Click on the **Log Manual Update** quick action. A blank pop-up will briefly appear and then close automatically, as shown below.



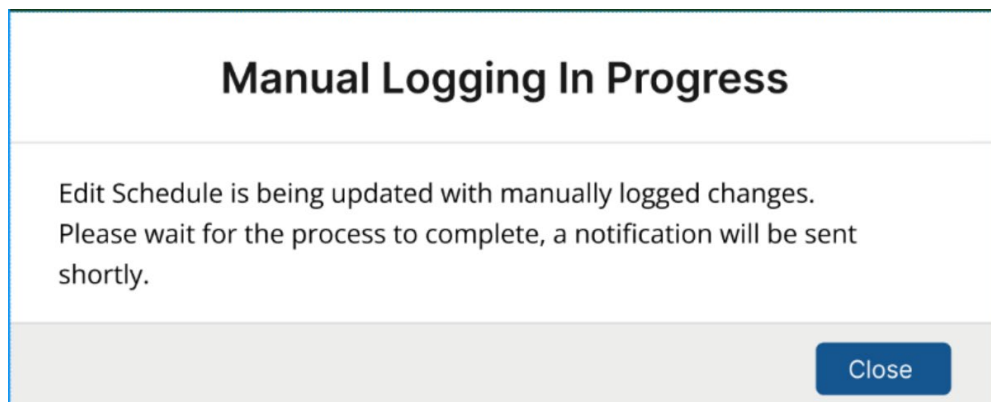
6. Upon completion, wait for the **Log Manual Update** process to finish.

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

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



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



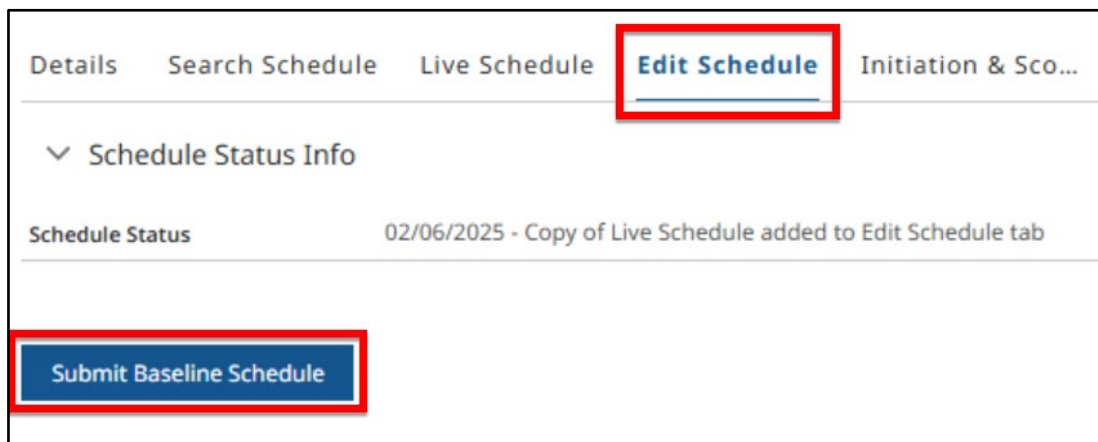
4.7.5 Submitting Baseline Schedule

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

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

To submit the **Baseline Schedule**:

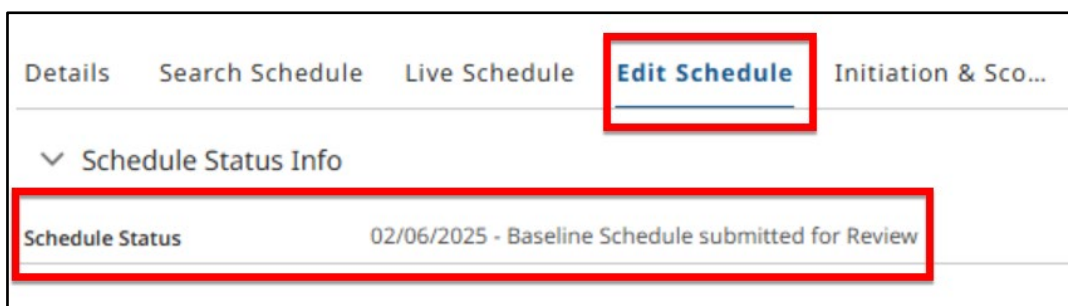
1. Go to the **Project**.
2. Go to **Edit Schedule**
3. Under the **Edit Schedule > Schedule Status Info** section, click **Submit Baseline Schedule**.



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



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

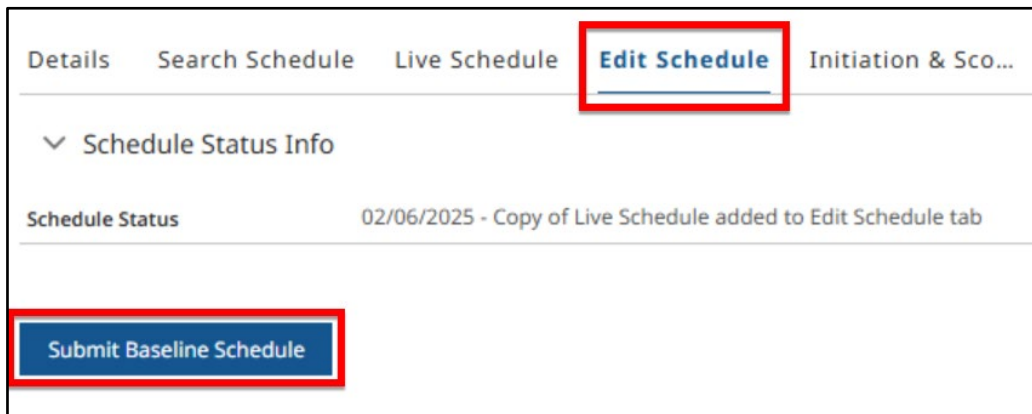


4.7.5.1 Discrepancies Screen in the Edit Schedule

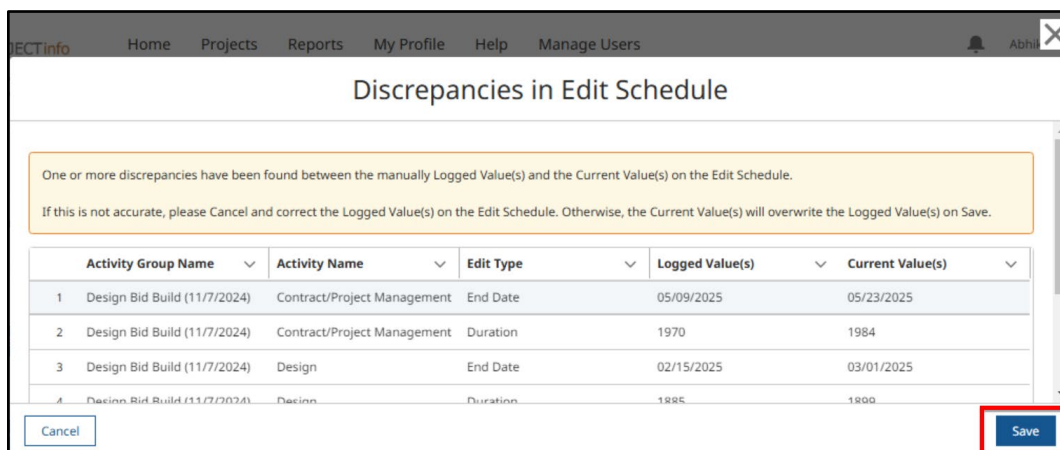
Discrepancies in the Edit Schedule screen may be displayed while Submitting the Baseline Schedule, when there are some additional changes made on the Edit Schedule after the **Log Manual Update** is clicked.

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

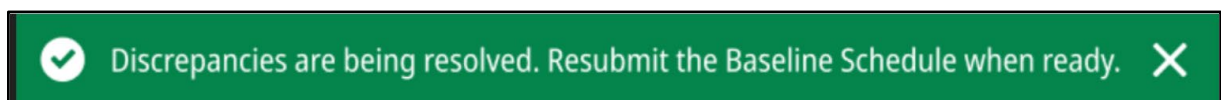
1. Go to the **Project**.
2. Go to the **Edit Schedule**.
3. Under the **Edit Schedule > Schedule Status Info** section, click **Submit Baseline Schedule**.



4. Click on **Save**.



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



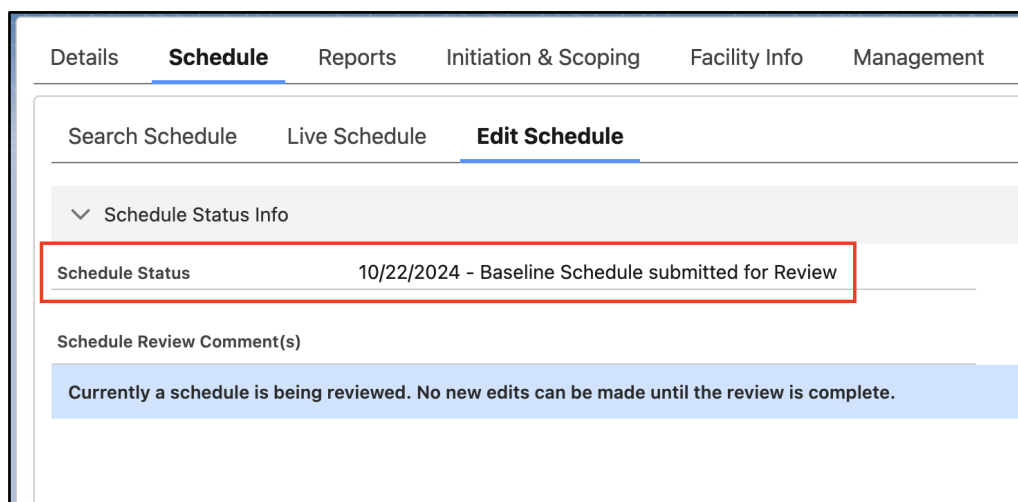
In case of **Monthly Schedule Update**, the message states '**Discrepancies are being resolved. Resubmit the Schedule when ready**':



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.



4.7.6 Uploading the Schedule Narrative Document

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

The narrative can address:

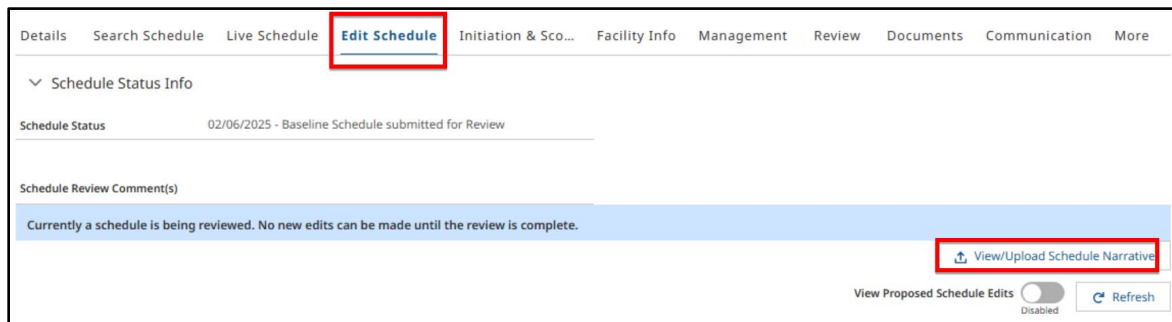
- All the Activities Completed before the ProjectInfo Baseline Submission, that have been Manually Scheduled
- **Status** of each major deliverable
- Issues and proposed solutions
- Significant **Meetings and Events**
- Outstanding issues and critical actions required by the Designer, MassDOT or third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

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

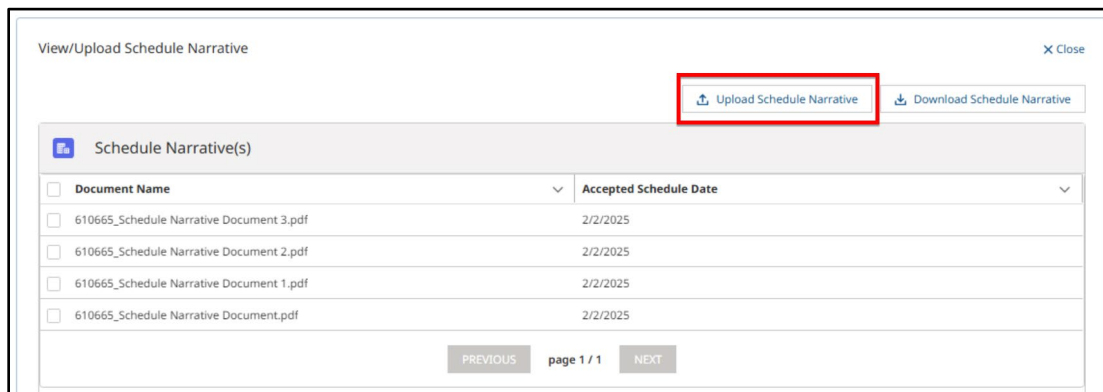
This document ensures that the **Project Manager** understands the rationale behind the adjustments and can plan accordingly.

To upload a Schedule Narrative, follow the steps below:

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

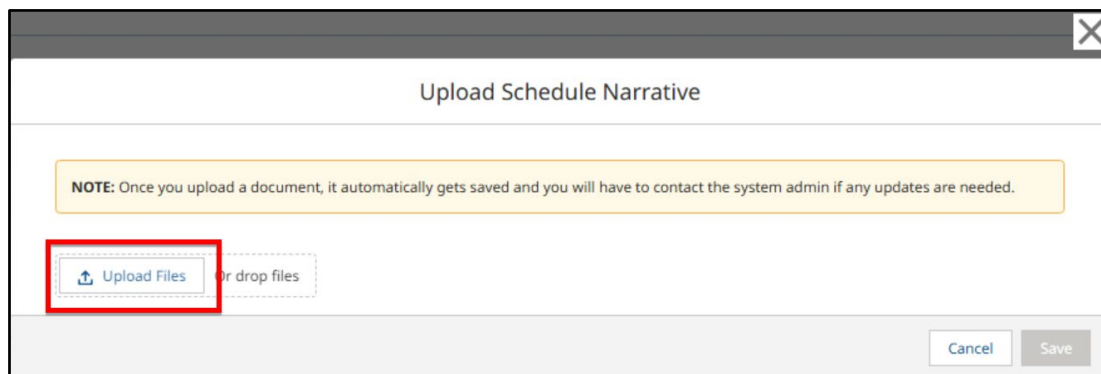


4. The user is directed to a **View/Upload Schedule Narrative** section.
5. Click the **Upload Schedule Narrative** button.

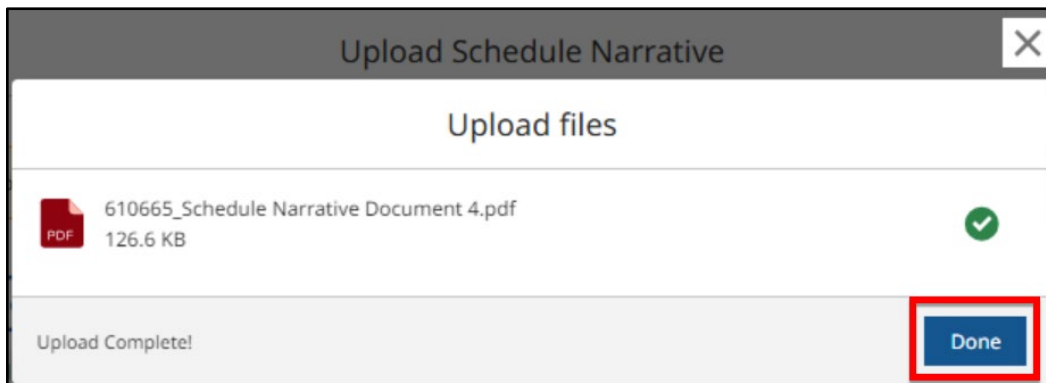


An **Upload Schedule Narrative** pop-up displays.

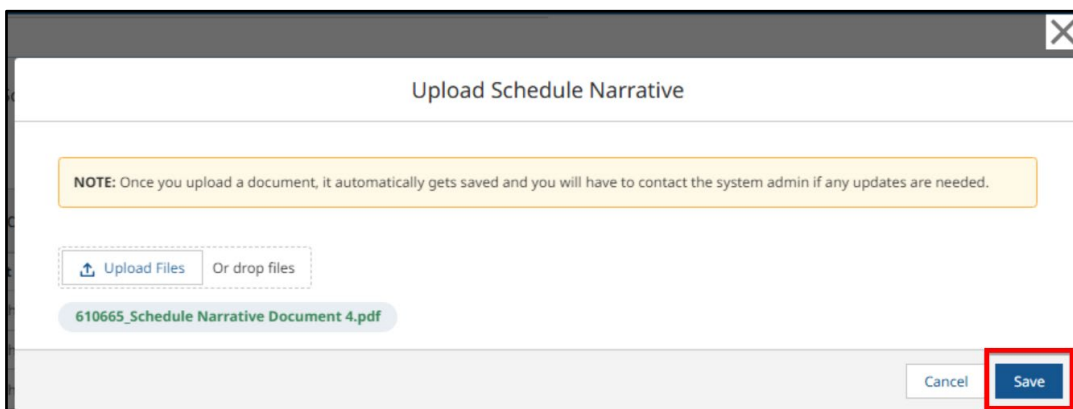
6. Click the **Upload Files** button or **drop files** to upload the required document(s).



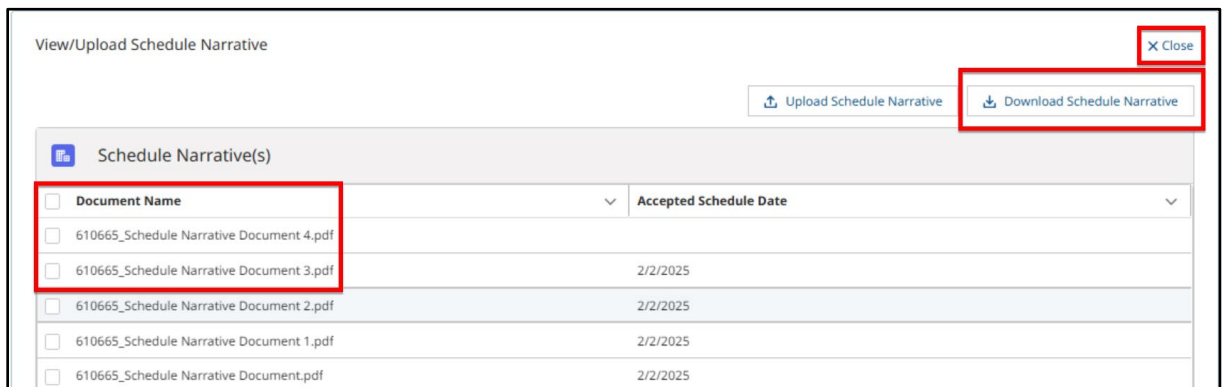
7. Click **Done**



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.

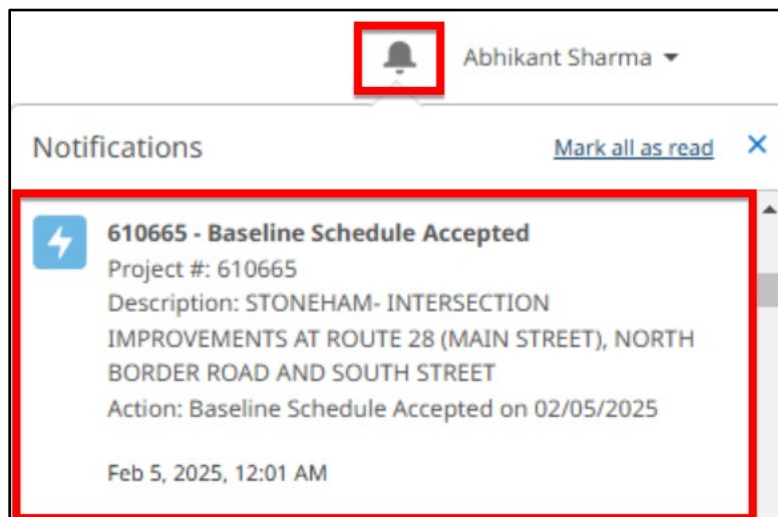


Note: Instead of uploading a **Schedule Narrative**, the External Design Lead Contact can also update the Project Manager using **Chatter** located on the Home Tab. Refer to the [Chatter](#) section for more details.

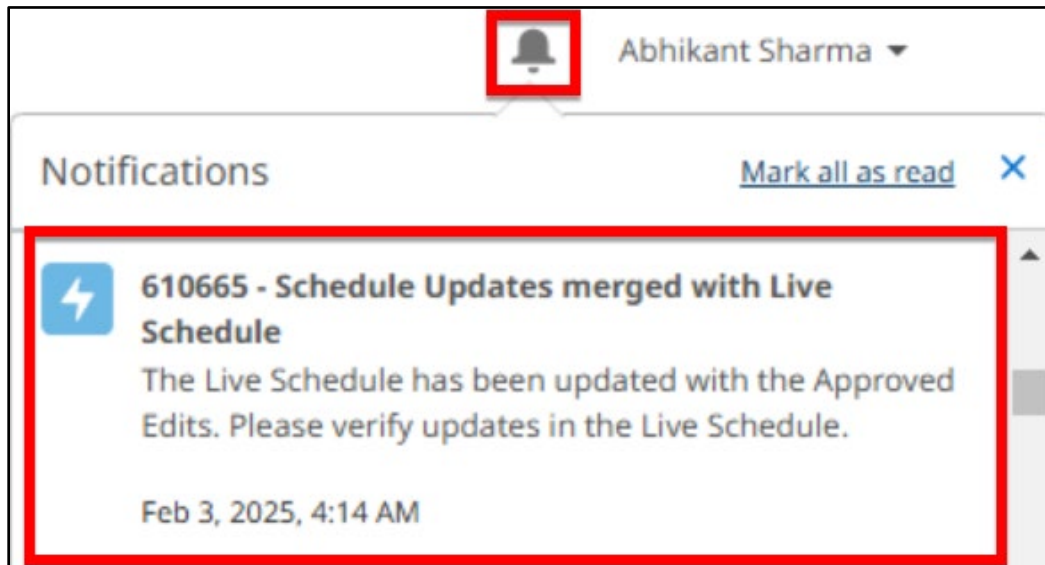
4.8 Baseline Schedule Accepted or Sent Back for Revision

4.8.1 Baseline Schedule Accepted

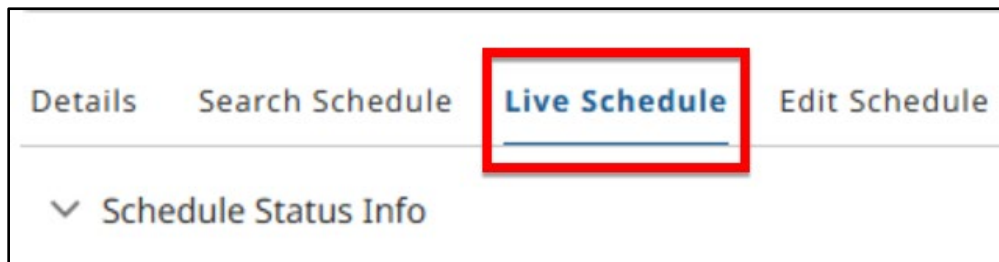
If the proposed Baseline Schedule is satisfactory, the Project Manager accepts the Baseline Schedule. The Design Lead Contact receives a Bell Notification and an Email notifying them of the Acceptance saying **Baseline Schedule Accepted**.



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



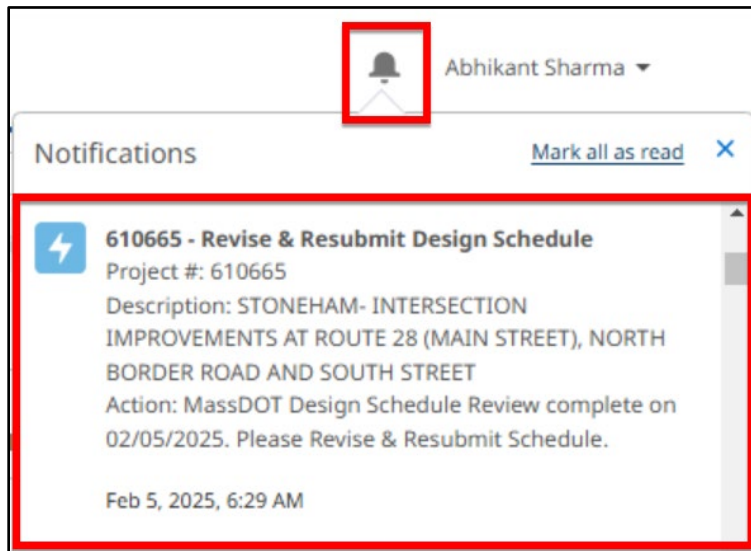
Upon receiving the notification, the External **Design Lead Contact** should navigate to the **Live Schedule** to verify that the **Baseline Schedule Updates** have been accurately merged under the **Live Schedule** tab.



4.8.2 Baseline Schedule Sent Back for Revision

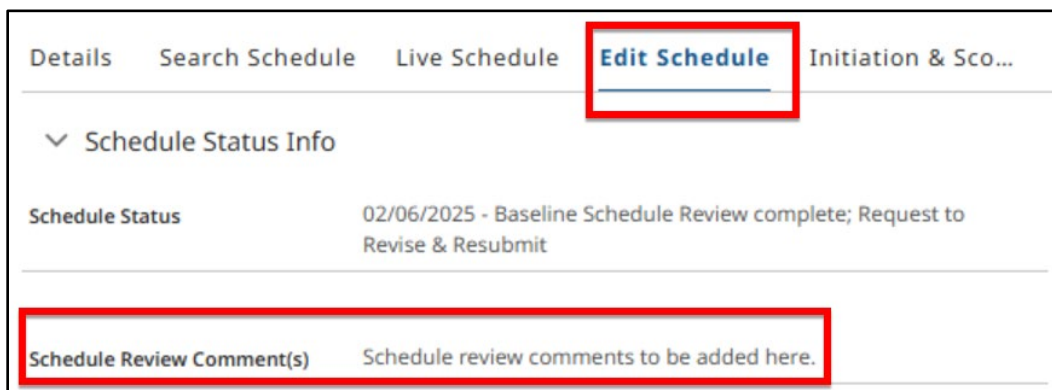
If the proposed Baseline Schedule is unsatisfactory, the Project Manager can send the Baseline Schedule back to **Revise and Resubmit** the Proposed Edits.

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



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

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

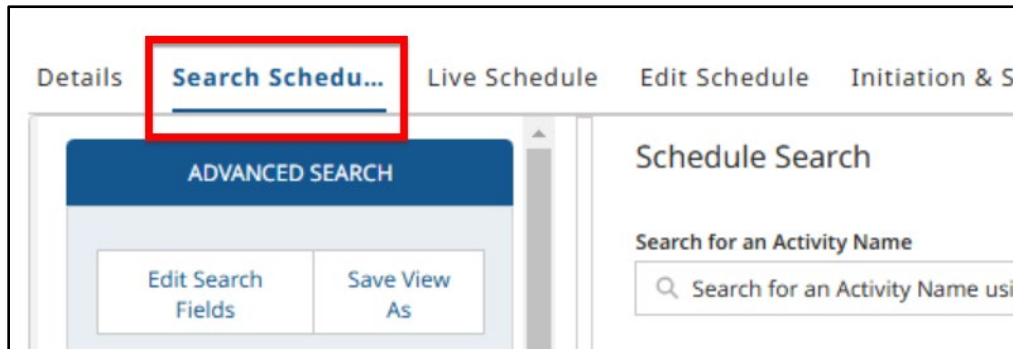


4. The Design Lead Contact can collaborate with the Project Manager using **Chatter** as well if needed. Refer to the [Chatter](#) section for more details on using Chatter.
5. The **Design Lead Contact** can update the **Edit Schedule** submitted based on the **Schedule Review Comments** received from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

4.9 Search Schedule

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

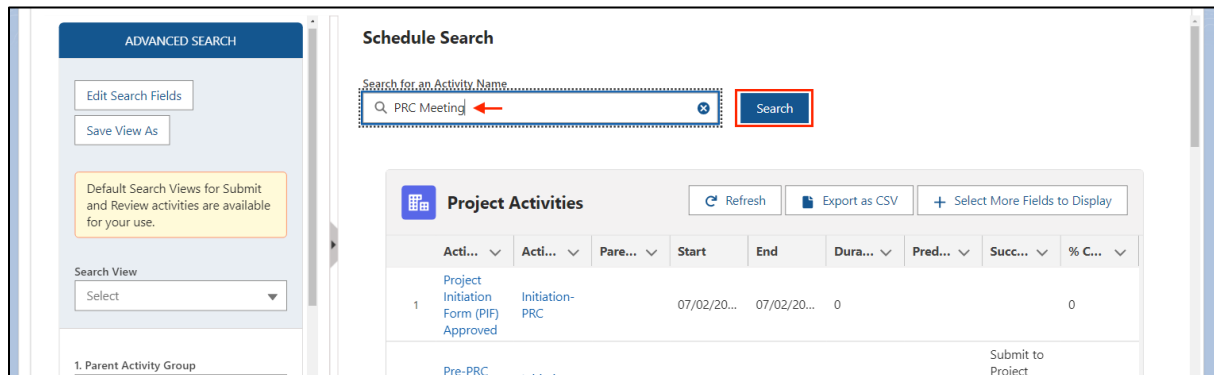
Go to the **Project > Search Schedule**.



4.9.1 Basic Schedule Search

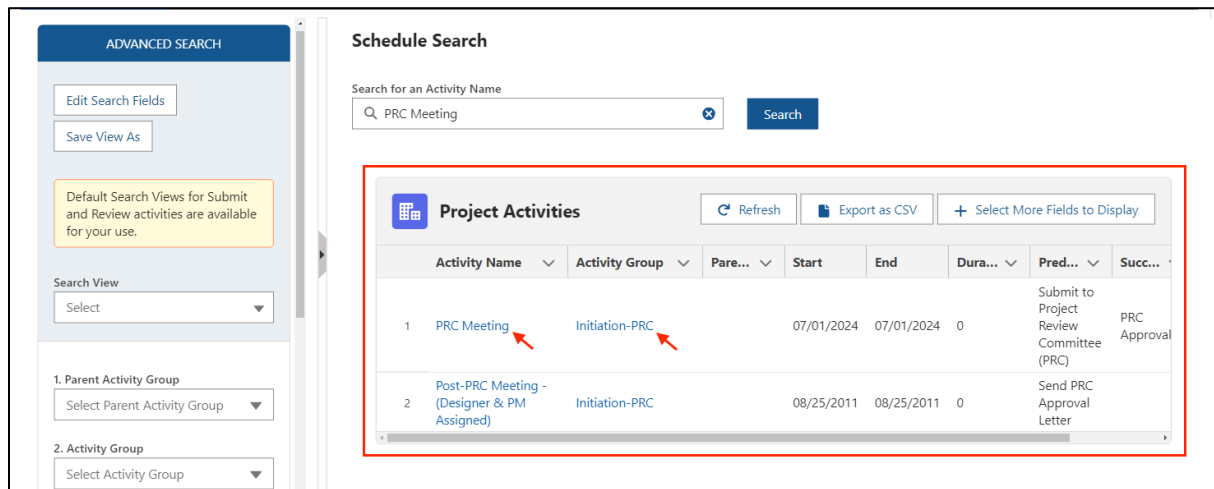
To search for an activity on the schedule using an Activity Name:

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



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.

4.9.2 Advanced Search Panel

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

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

The screenshot displays the 'Advanced Search' panel on the left and the 'Schedule Search' results on the right. The 'Advanced Search' panel includes a search bar, a 'Search View' dropdown, and five filter sections: 1. Parent Activity Group, 2. Activity Group, 3. Activity Type, 4. Activity Name, and 5. Predecessor. The 'Schedule Search' section shows a search bar and a 'Search' button. Below this is a table titled 'Project Activities' with columns: Activity Name, Activity Group, Parent..., Start, End, Duration, Predecessor, Successor, and % Complete. The table contains two rows of data.

Activity Name	Activity Group	Parent...	Start	End	Duration	Predecessor	Successor	% 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:

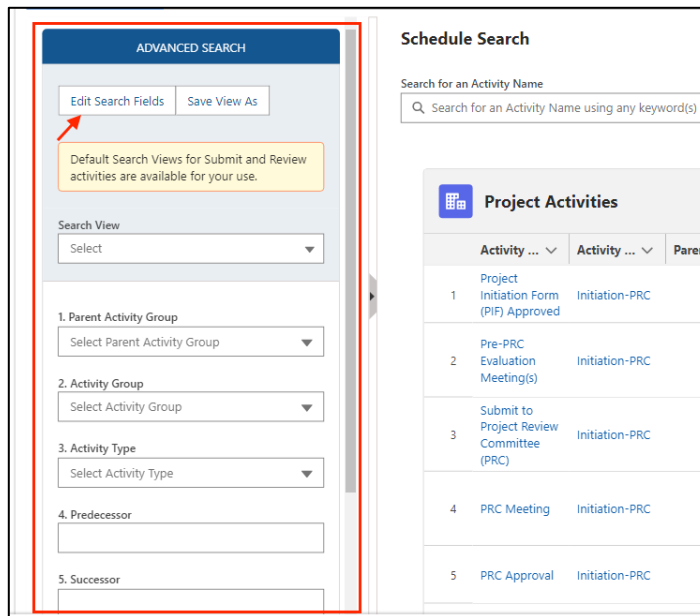
- Users can select one or more **Parent Activity Groups** from the dropdown options.

The screenshot displays 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' section is highlighted with a red box. It contains a dropdown menu labeled 'Select Parent Activity Group' with two selected items: 'Design' and 'Environmental', each preceded by a star icon. Below this are fields for '2. Activity Group', '3. Activity Type', '4. Activity Name', and '5. Predecessor'. The 'Schedule Search' panel on the right has a search bar and a list of results under the heading 'Project Activity Name'. The first result is '1 PRC Meeting' and the second is '2 Post-PRC Meeting (Designer & PM Assigned)'.

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

This screenshot shows the 'ADVANCED SEARCH' panel with the '4. Activity Name' field highlighted by a red box and a blue border. The text 'PRC Meeting' is entered into this field, with a red arrow pointing to it. The other fields in the panel are '1. Parent Activity Group', '2. Activity Group', '3. Activity Type', '5. Predecessor', '6. Successor', '7. Owner', and '8. Activity Sequence'. At the bottom of the panel are buttons for 'Add Filter Logic', 'Reset', and 'Search'. The 'Schedule Search' panel on the right is partially visible, showing the same search bar and results list as the previous image.

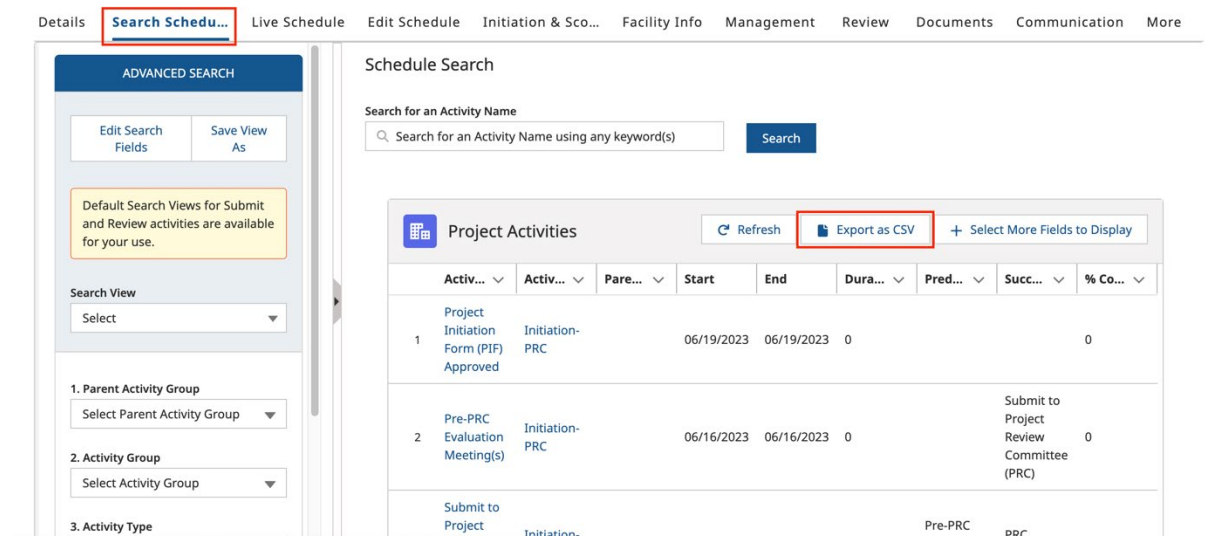
To adjust the Advanced Search fields, users can proceed by clicking the **Edit Search Fields** button on the left panel.



4.9.3 Export Project Activities as a Report

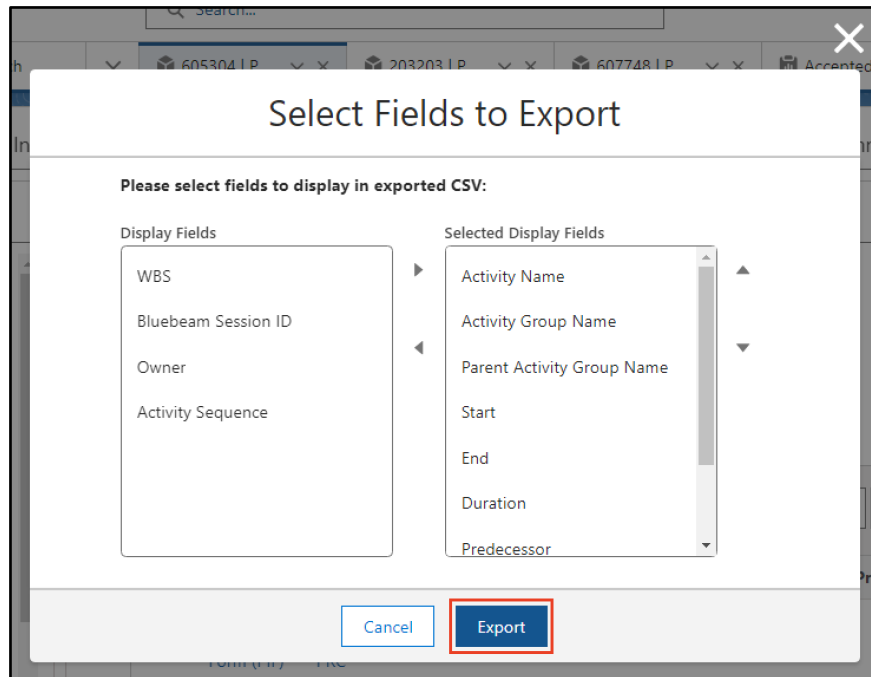
To export all the project activities on a Schedule as a report, follow the instructions below:

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



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.

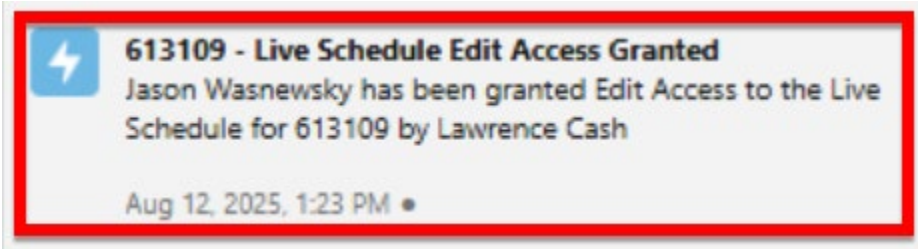
Activity Name	Activity Group	Parent Activity Group Name	Start	End	Duration	Predecessor	Successor	% Complete
1 Project Initiation Form (PIF) Approved	Initiation-PRC		7/2/2024	7/2/2024	0			0
2 Pre-PRC Evaluation Meeting(s)	Initiation-PRC		7/1/2024	7/1/2024	0	Submit to		0
4 Submit to Project Review Committee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

4.10 Making Schedule Updates to the Live Schedule

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

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

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



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

The other method to propose schedule updates is by creating a copy of the Live Schedule under the Edit Schedule Tab, similar to the steps for creating a Baseline schedule.

For further details on how to create a copy under the Edit Schedule, consult the [Copying a Live Schedule](#) section.

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

4.10.1 Proposing Updates on the Edit Schedule

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

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

1. Activities Manually Scheduled
2. Changed End Dates and Durations
3. Activities marked as Not Applicable
4. New Activities/Activity Groups
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

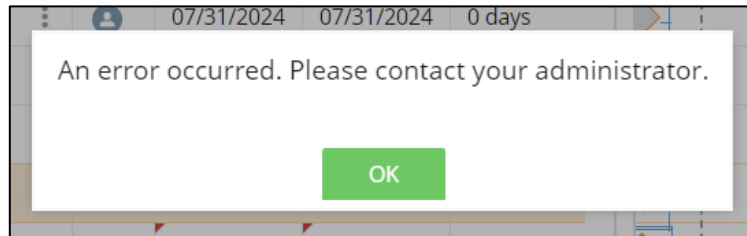
Users should avoid making the following changes on the Schedule:

- 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:



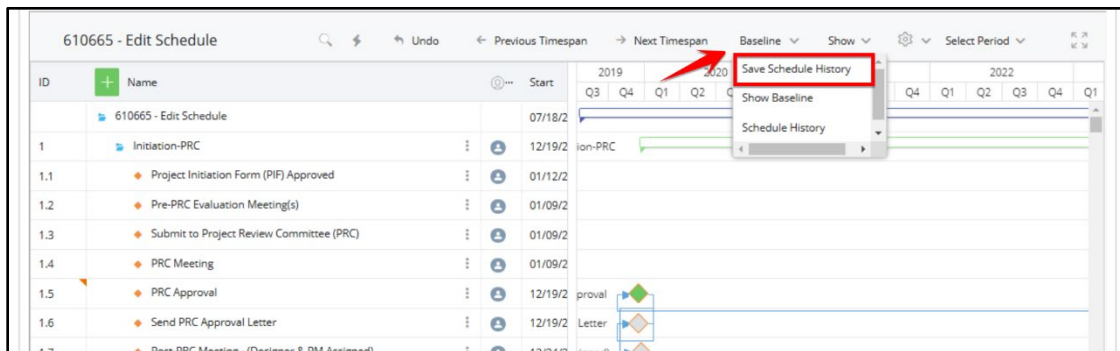
The External Design Lead Contact can make updates to existing **Activity Groups**, **Activities**, and **Milestones**, or add new **Activity Groups**, **Activities**, or **Milestones** to the **Edit Schedule**.

4.10.2 Adding a Snapshot

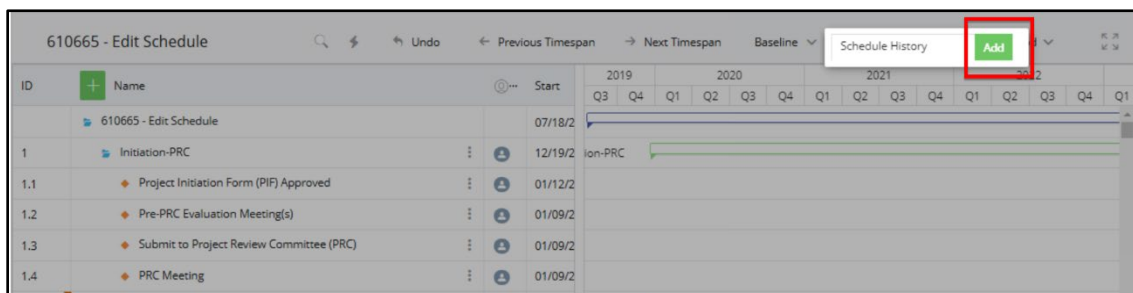
A Snapshot should be added on the Edit Schedule to check the Total Slack and Delta between the End Dates, for comparing two versions of the Edit Schedule.

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

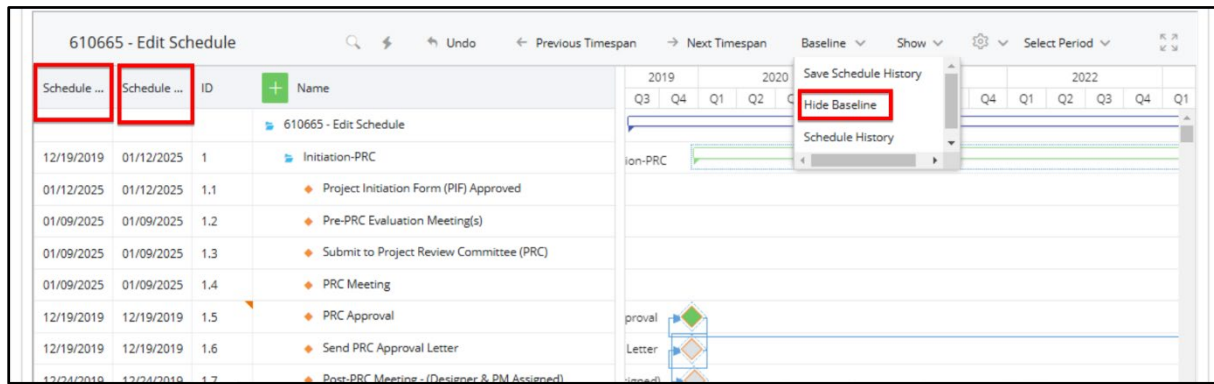
1. Go to the **Project**.
2. Go to **Schedule > Edit Schedule**.
3. Click on the **Baseline** dropdown and select the **Save Schedule History** option.



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.



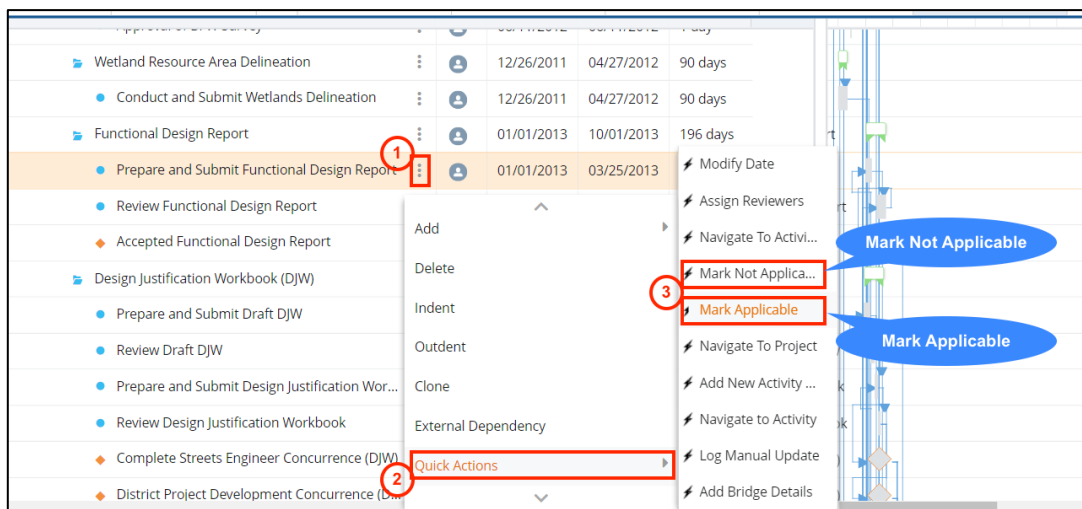
4.10.3 Marking Activities/Activity Groups as Applicable/Not Applicable

Any activity or activity group that is out of scope for the project can be marked as **Not Applicable**. For further details, refer to the [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.

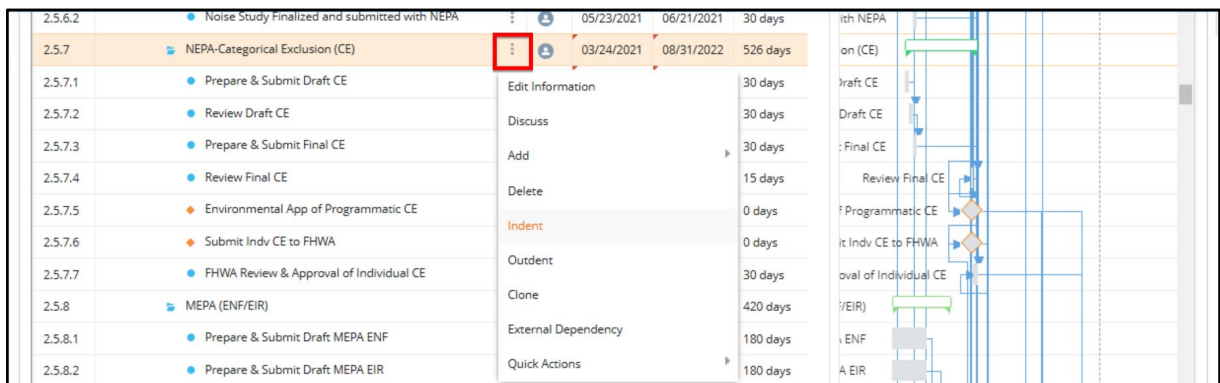


Note: When an **Activity/Activity Group** is marked as **Applicable** again, the **Not Applicable** sticker is removed. However, the **Activity Duration** and **Dependencies (Predecessors/Successors)** must be updated manually.

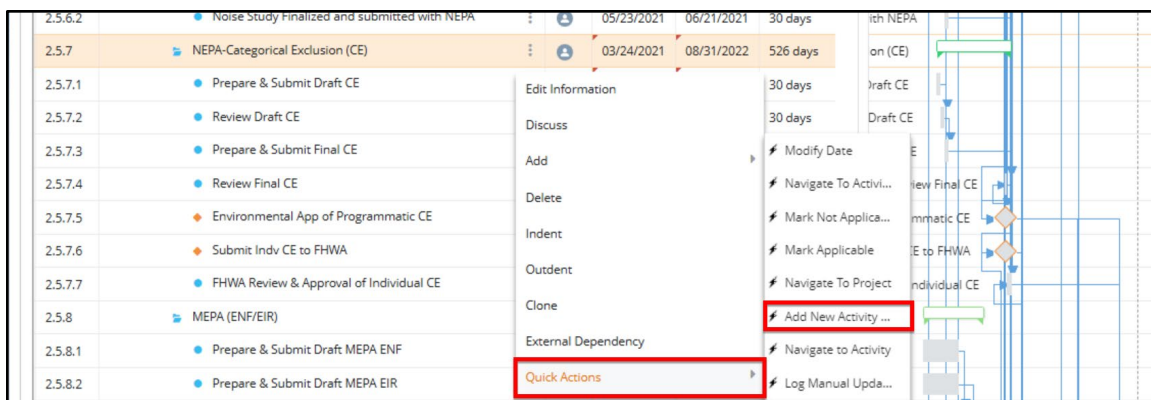
4.10.4 Adding Activity Groups

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

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



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

The screenshot shows the 'Add New Activity Group' form. The 'New Activity Group' field is highlighted with a red box. Below it, the 'Activities' section is highlighted with a red box, showing checkboxes for 'Prepare', 'Submit', 'Review', and 'Approval'. The 'Start Date' field is also visible.

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**.

* Activity Review Discipline

- ☐ Design
- ☐ Traffic & Safety
- ☐ Bridge
- ☐ Utilities & Constructability
- ☒ Environmental
- ☐ Right-of-Way

* Stage Sticker

--None--

WBS Code

Event Code

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

☐ Utilities & Constructability

☒ Environmental

☐ Right-of-Way

* Stage Sticker

Stage = 025%

WBS Code

Event Code

Next

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

2.5.8	New Activity Group	⋮		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**.

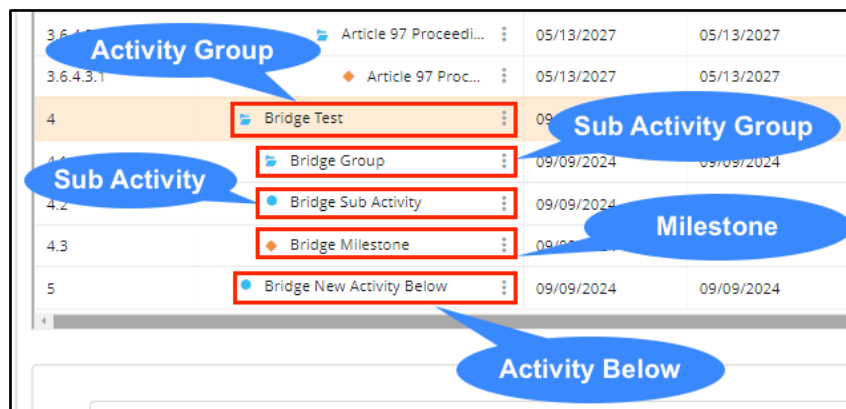
Note: The **WBS Structure** has been carefully developed to reflect the Area of Work and the Division/Subdivision of Work as defined in the Scoping Workbook. The **WBS Structure** should not be modified under any circumstances. Reach out to Project

Controls using Chatter if any questions regarding WBS Codes for New Activity Groups.

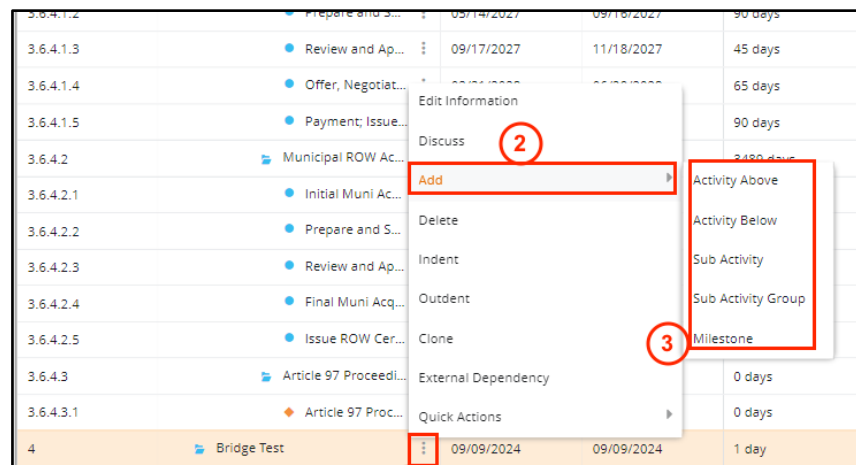
12. Similarly, update the **WBS Code** for all the Activities/Milestones under the New Activity Group.

4.10.5 Adding a new Activity under Activity Group (Activity, Milestones, Sub Activity, and Sub Activity Group)

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



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.

4.10.6 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.

4.10.7 Editing Dependencies

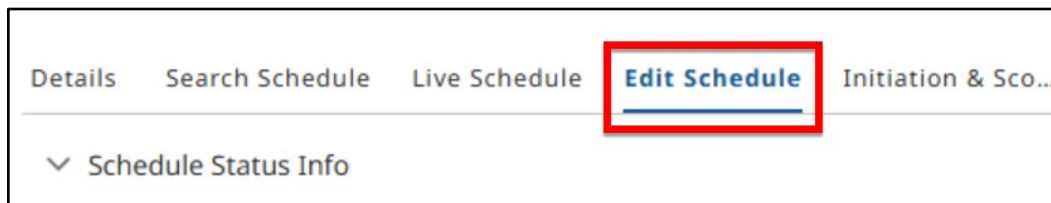
The Design Lead Contact can propose **Dependency (Predecessors/Successors)** changes under the **Edit Schedule**. Refer to the [Editing Dependencies](#) section for more details.

4.10.8 Adding Resubmission Activity Group

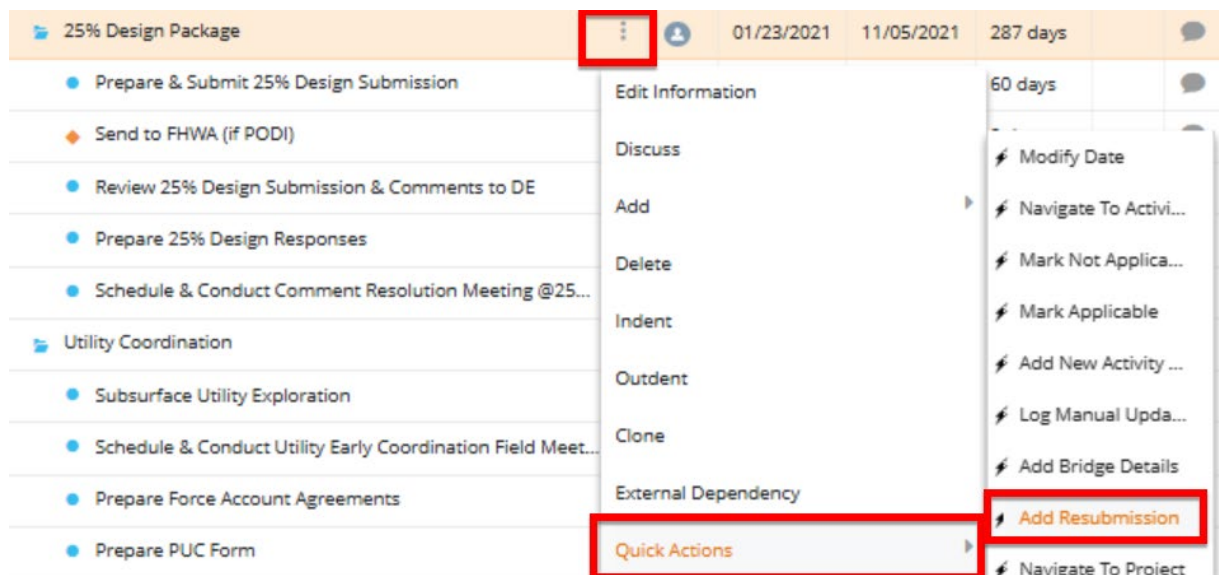
Resubmissions are primarily applicable to **Design Packages** but may not be relevant to all **Activity Groups**.

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

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



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



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

[Cancel](#) [Add](#)

6. Click on **Close**

Add New Resubmission Activity Group

✓ Resubmission Activity Group added successfully.

[Close](#)

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

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	...

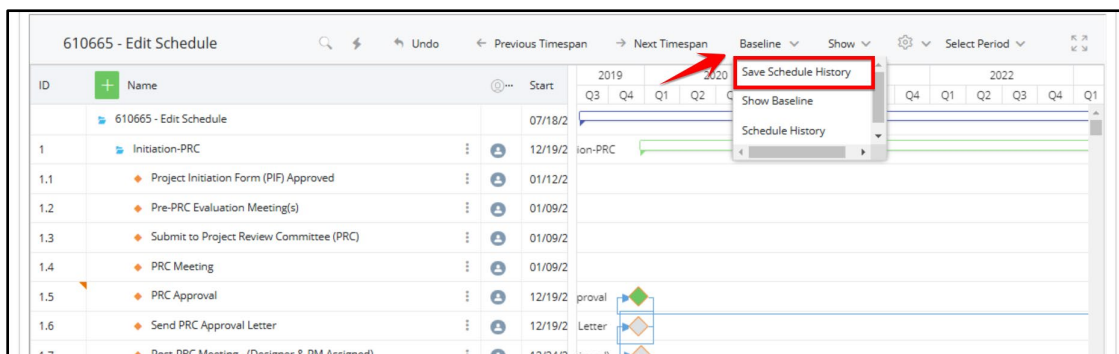
4.10.9 Reviewing Total Slack and Critical Path

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

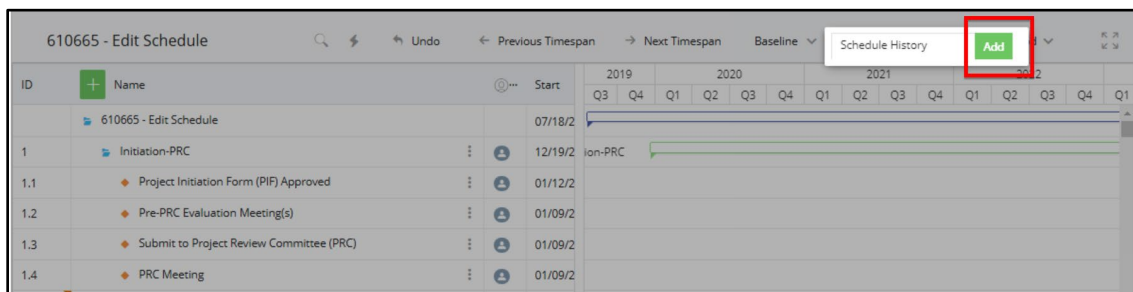
4.10.9.1 Adding a Snapshot

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

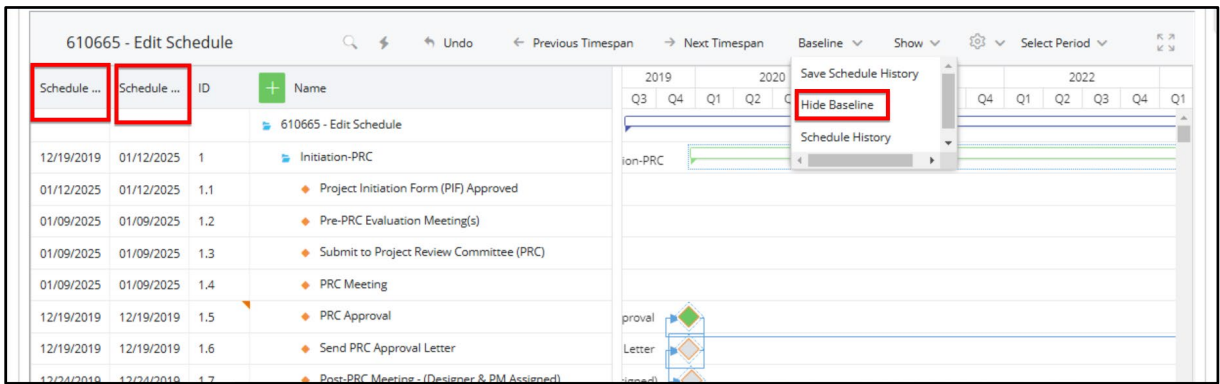
5. Go to the **Project**.
6. Go to **Schedule > Edit Schedule**.
7. Click on the **Baseline** dropdown and select the **Save Schedule History** option.



8. 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.

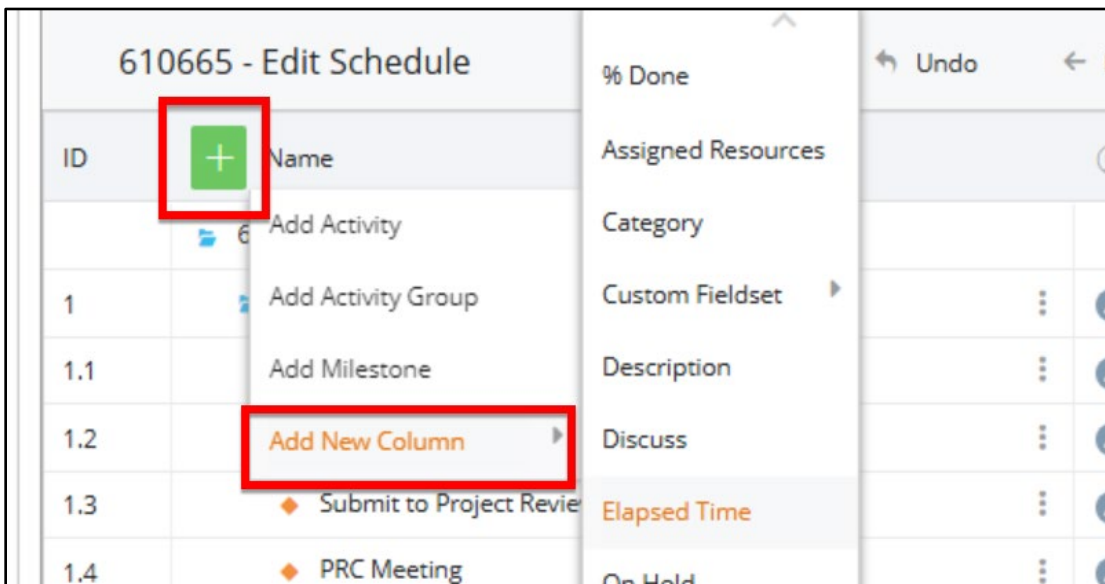


4.10.9.2 Reviewing Total Slack

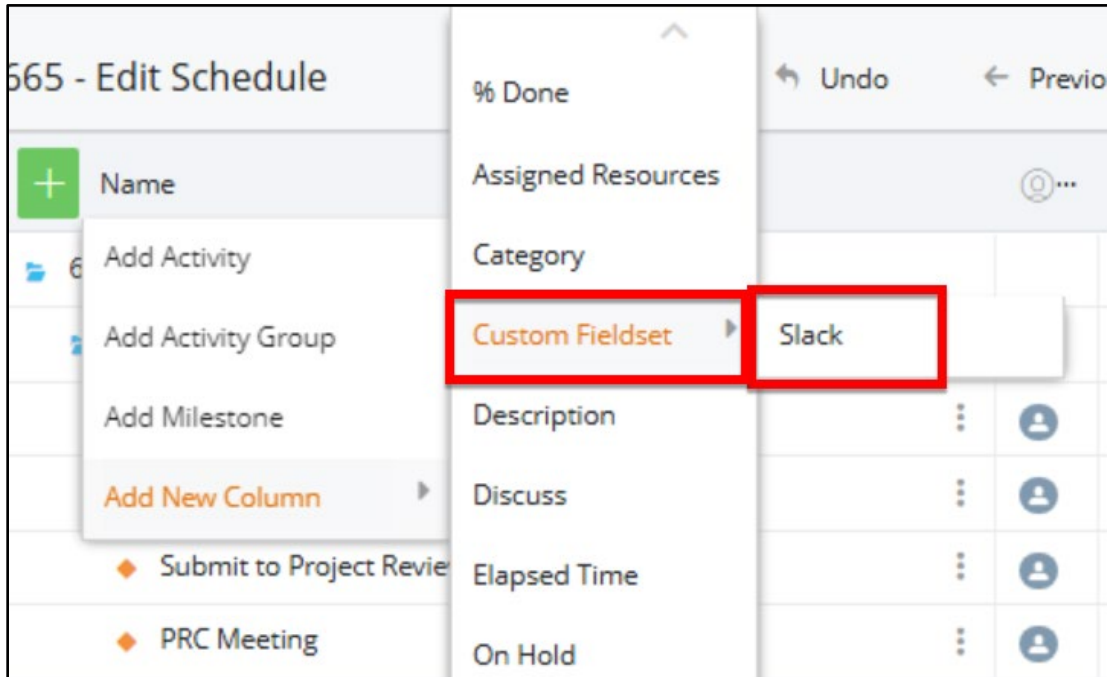
Total Slack determines the number of days a Schedule Activity can be delayed without impacting the Schedule End Date (i.e. the **Construction Contract NTP Date**).

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

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



- 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' window. The table has columns: Name, Start, End, Duration, Total (In ...), and Delta (In ...). The 'Total (In ...)' column is highlighted with a red box. The data rows are 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' window. The table has columns: ID, Name, Start, End, Duration, Total (In ...), and Delta (In ...). The 'Delta (In ...)' column is highlighted with a red box. The data rows are 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

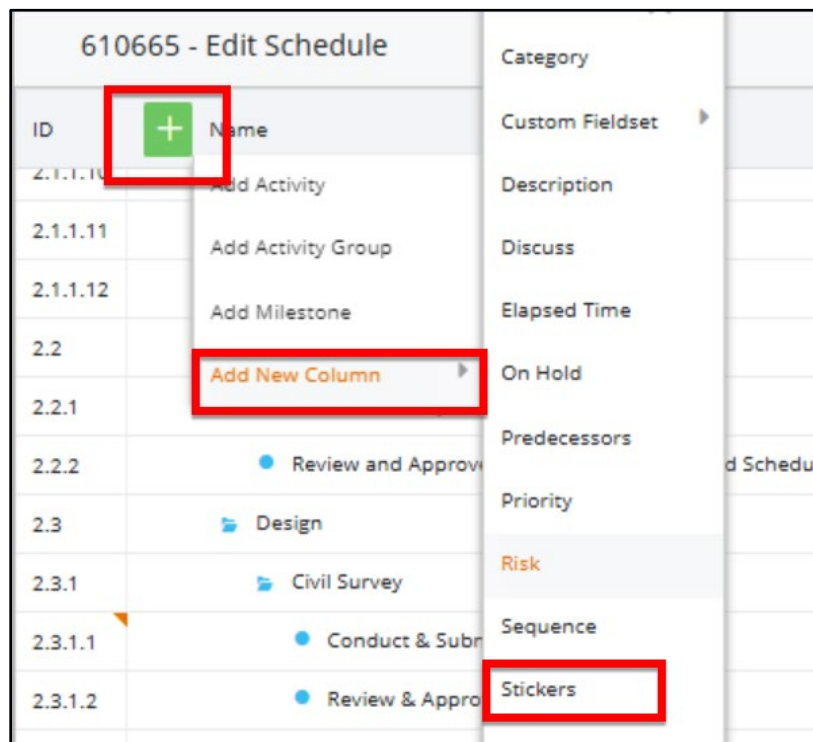
4.10.9.1 Reviewing Critical Path

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

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

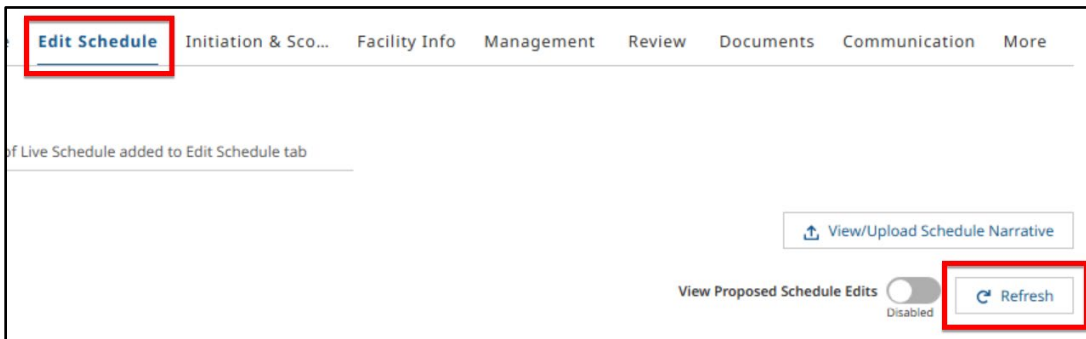
To review the Activities on the **Critical Path** on the **Edit Schedule**:

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.



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

Name	Start	End	Duration	Stickers	Total...
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

5. 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.

4.10.9.2 Reviewing End Date Delta

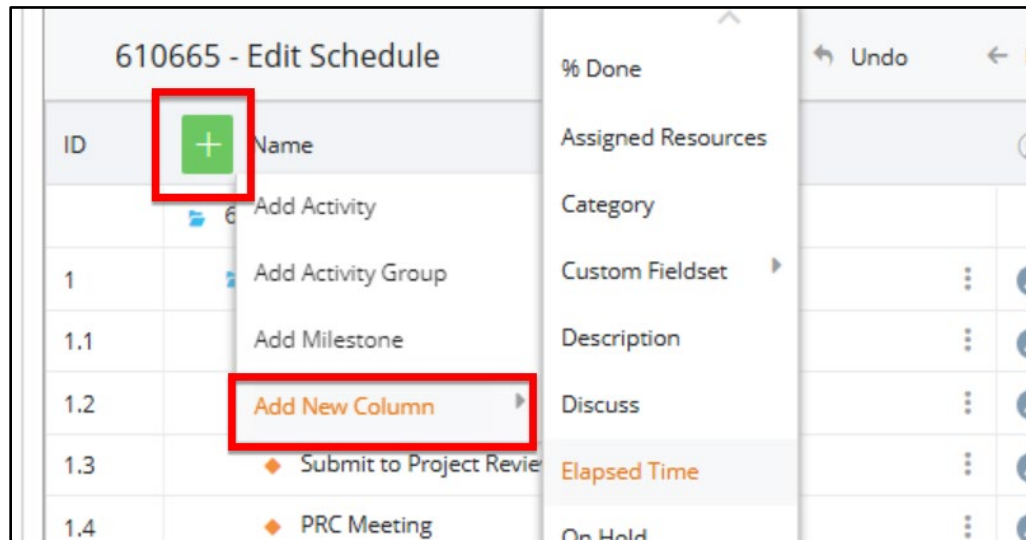
Note: Add a Snapshot on the Edit Schedule for reviewing the End Date Delta

End Date Delta is the difference between the End Dates of the Schedule Activities between the first snapshot and the latest snapshot taken on the Edit Schedule.

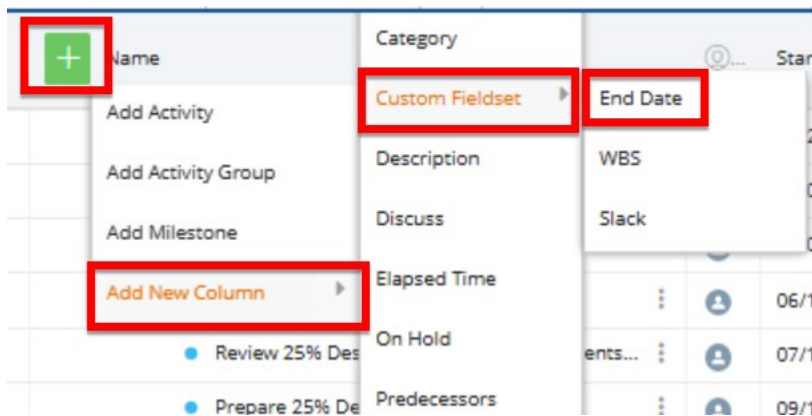
End Date Delta = (End Date of the Activity in the First Snapshot taken after creating a Copy) - (End Date of the Activity in the Latest Snapshot).

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

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



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

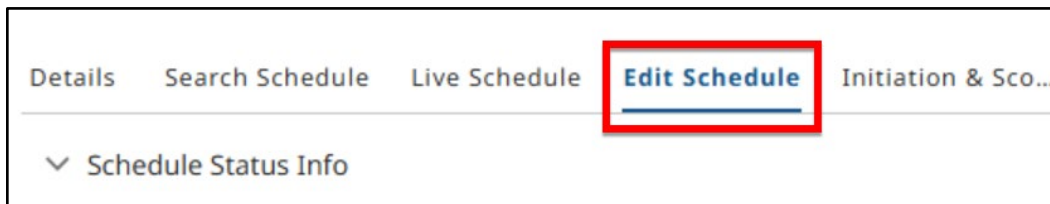
4.10.9.3 Reviewing Ad Date on the Edit Schedule Gantt Chart

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.

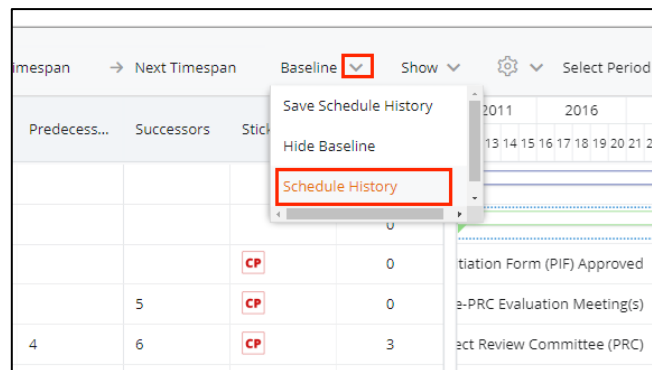
4.10.10 Viewing Schedule History

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

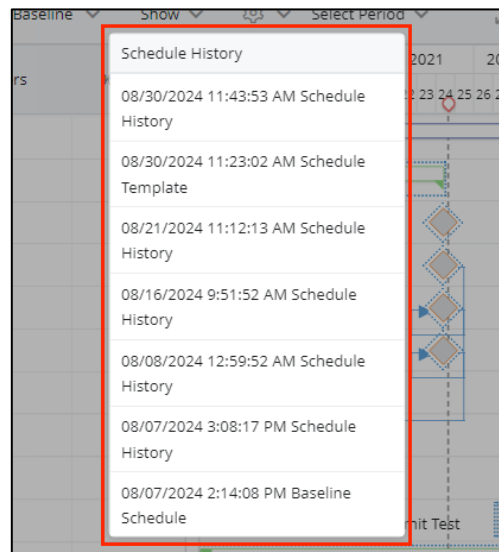
1. Go to the **Project**.
2. Go to the **Edit Schedule**.



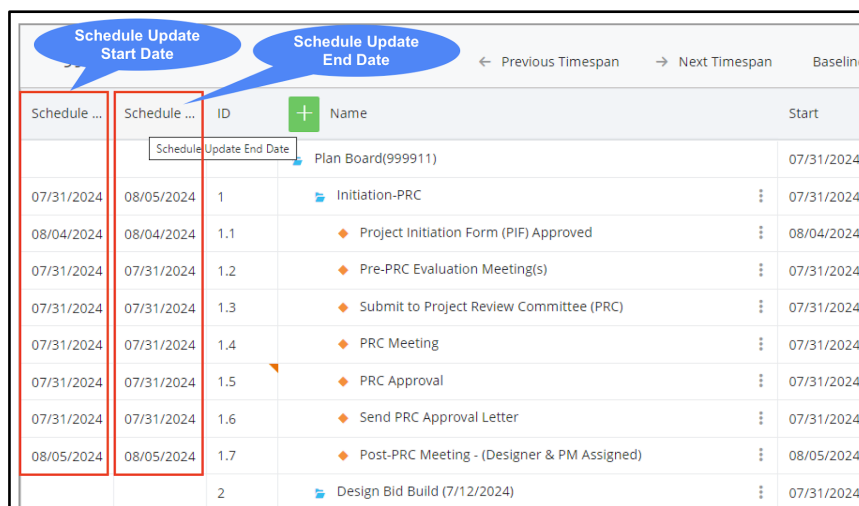
3. On the **Edit Schedule**, click the down arrow next to **Baseline** and select the **Schedule History** option.



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.

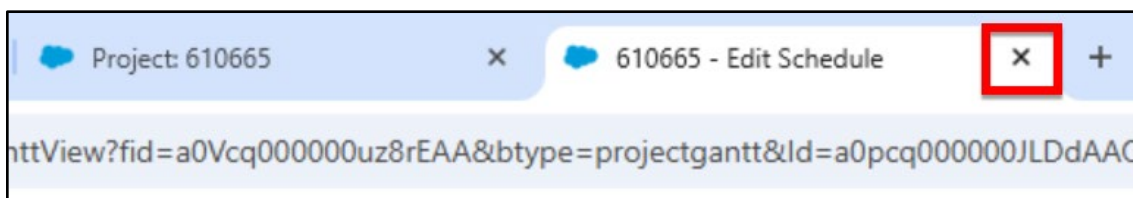


Schedule ...	Schedule ...	ID	Name	Start
	Schedule Update End Date		Plan Board(999911)	07/31/2024
07/31/2024	08/05/2024	1	Initiation-PRC	07/31/2024
08/04/2024	08/04/2024	1.1	Project Initiation Form (PIF) Approved	08/04/2024
07/31/2024	07/31/2024	1.2	Pre-PRC Evaluation Meeting(s)	07/31/2024
07/31/2024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

4.10.11 Logging Manual Updates

Prerequisites:

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



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

Refer to [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)	...

- 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	Edit Information		60 days	
2.3.9.2	Send to FHWA (if PODI)	Discuss			
2.3.9.3	Review 25% Design Submission & Comments to DE	Add			
2.3.9.4	Prepare 25% Design Responses	Delete			
2.3.9.5	Schedule & Conduct Comment Resolution Meeting @25% (Full Team)	Indent			
2.3.10	Utility Coordination	Outdent			
2.3.10.1	Subsurface Utility Exploration	Clone			
2.3.10.2	Schedule & Conduct Utility Early Coordination Field Meeting	External Dependency			
2.3.10.3	Prepare Force Account Agreements	Quick Actions			
2.3.10.4	Prepare PUC Form				

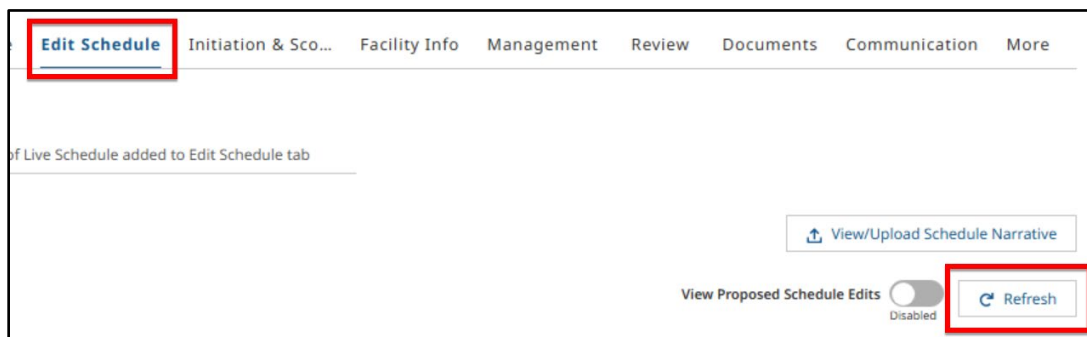
- A blank pop-up will briefly appear and then close automatically, as shown below.

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	

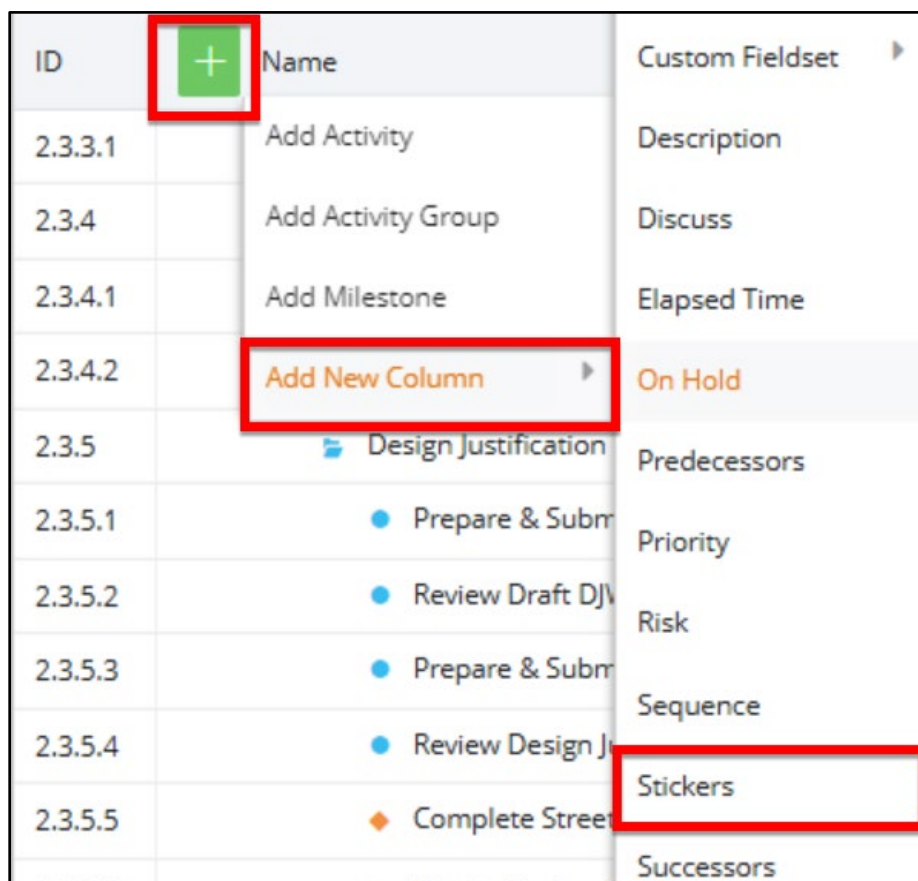
After logging a manual update, a **Manual Update (MU)** sticker will be automatically added to the selected Activity Group/Activity.

- 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**.

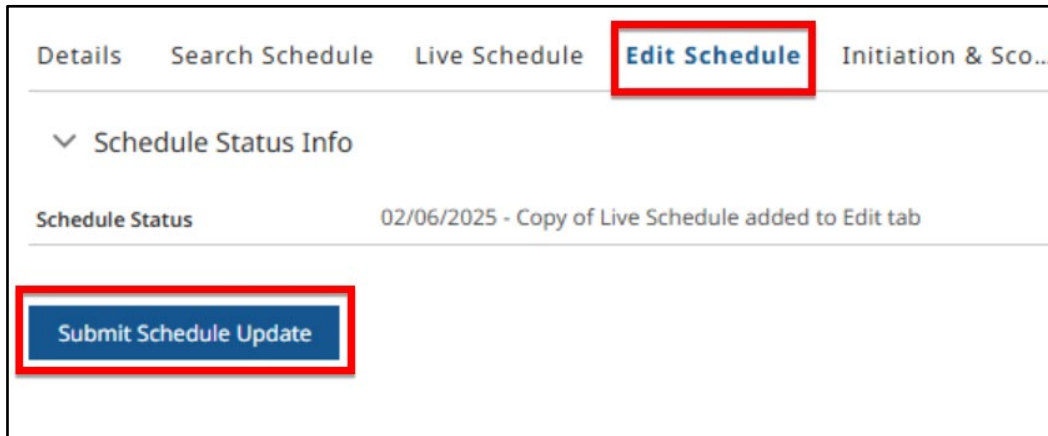
2.3.9	25% Design Package - Rev 1		01/22/2021	11/04/2021	287 days	MU
2.3.9.1	Prepare & Submit 25% Design Submission		01/22/2021	03/22/2021	60 days	MU
2.3.9.2	Send to FHWA (if PODI)		03/22/2021	03/22/2021	0 days	MU
2.3.9.3	Review 25% Design Submission & Comments to DE		07/07/2021	10/04/2021	90 days	MU
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

4.10.12 Submitting Schedule Update

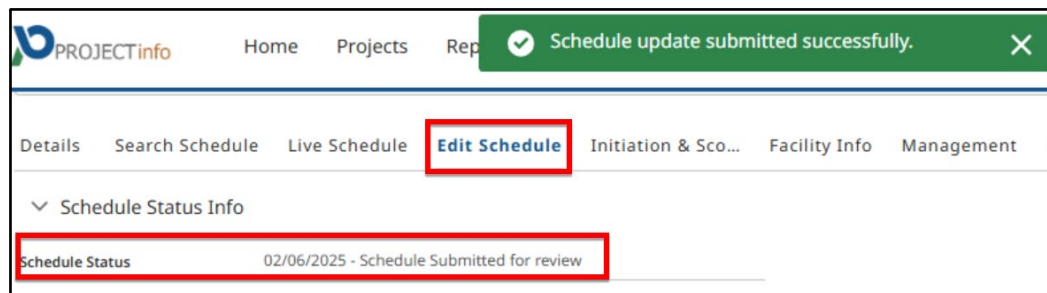
Once the proposed updates are completed and are **Logged Manual Updates** on the **Edit Schedule** tab, the External Design Lead Contact can submit the proposed changes for the Project Manager's approval.

To submit the proposed changes:

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



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.



4.10.13 Discrepancies Screen in the Edit Schedule

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

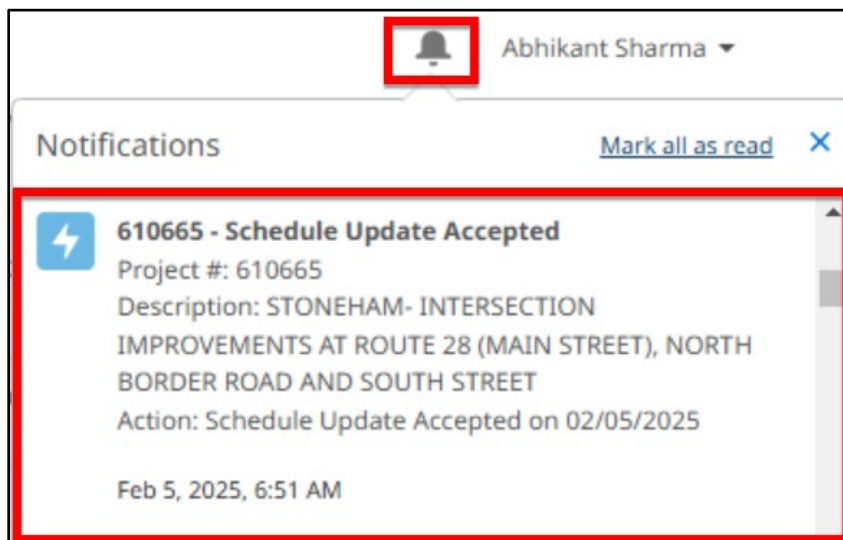
4.10.14 Uploading the Schedule Narrative Document

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

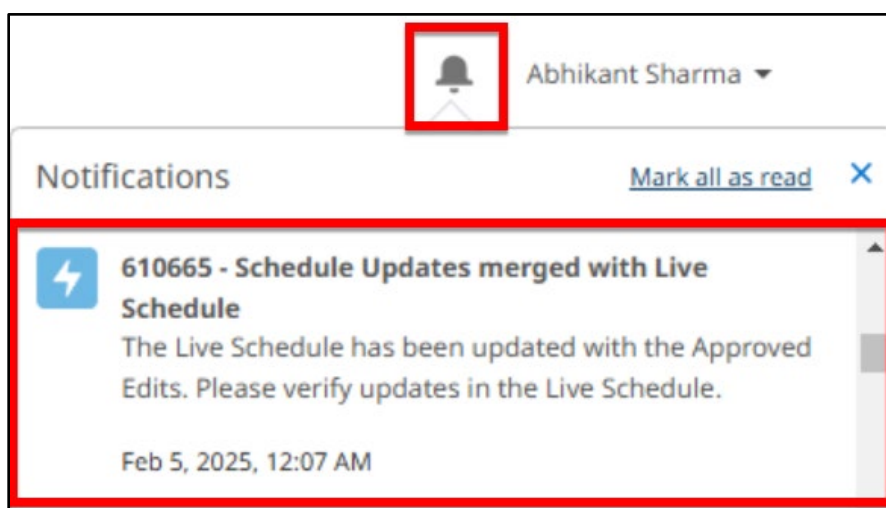
4.11 Schedule Update Accepted or Sent Back for Revision

4.11.1 Schedule Update Accepted

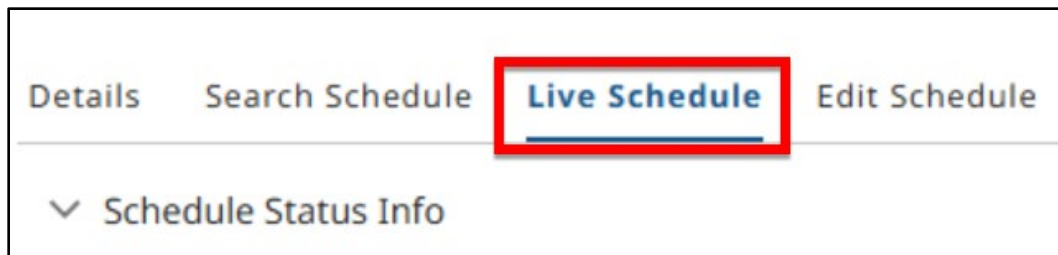
If the proposed Schedule Update(s) are satisfactory, the Project Manager accepts the Schedule Update(s). The Design Lead Contact receives a Bell Notification and an Email notifying them of the Acceptance saying **Schedule Update Accepted**.



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



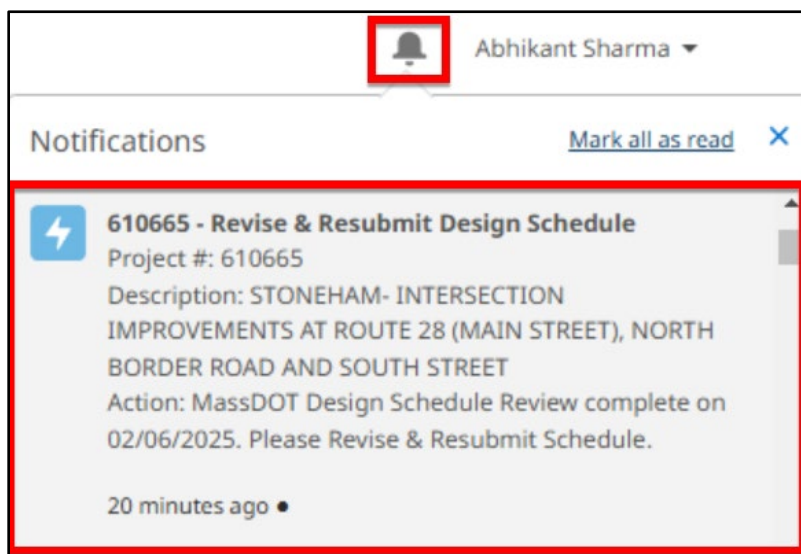
Upon receiving the notification, the **Design Lead Contact** should navigate to the **Live Schedule** to verify that the **Schedule Update(s)** have been accurately merged under the **Live Schedule** tab.



4.11.2 Schedule Update Sent Back for Revision

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

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



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

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

Details Search Schedule Live Schedule **Edit Schedule** Initiation & Sco... F

▼ Schedule Status Info

Schedule Status 02/06/2025 - Baseline Schedule Review complete; Request to Revise & Resubmit

Schedule Review Comment(s) Schedule review comments to be added here.

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.

4.12 Documents

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

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

Notes:

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

4.12.1 Document Search

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

4.12.1.1 Basic Document Search

To search for a document with a Document Name:

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

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

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

Accepted Schedule Date

BDept

BIN

District

External Access

Facility Carried

Feature Intersected

Selected Search Fields

Document Name

Document Tag

Version

Document Category

Milestone

Area of Work

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.

4.12.1.2 Advanced Search Panel

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

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

Steps performed on the **Documents > Advanced Search** Panel are similar to the steps mentioned in [Schedule Search > Advanced Search](#) section.

The screenshot shows the 'Documents > Advanced Search' panel. The left sidebar contains the following filters:

- ADVANCED SEARCH**
 - Edit Search Fields
 - Save View As
 - Search View: Select
 - 1. Milestone: Select Milestone
 - 2. Area of Work: Select Area of Work
 - 3. Activity Group: Select Activity Group
 - 4. Document Tag: Select Document Tag
 - 5. Document Category: Select Document Category
 - 6. Document Name: [Text Field]
 - 7. Version: [Text Field]
 - 8. Upload By: [Text Field]
 - 9. Upload Date: From [Calendar] To [Calendar]
 - Reset Search

The main area displays 'Document Search' results. It includes a search bar and a 'Search' button. Below the search bar, there are two identical tables of 'Uploaded Document(s)'. Each table has an 'Export as CSV' button and a '+ Select More Fields to Display' link. The tables list three documents:

	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/Project Management	Project Milestones
2	<input type="checkbox"/> PINFO UAT TEST 1.pdf	Other	2.0	Submission	25%	Procurement Phase	RFQ
3	<input type="checkbox"/> PINFO UAT TEST.pdf	Other	1.0	Submission	25%	Procurement Phase	RFLOI

Export Documents as a Report

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

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

1. Select the checkbox against the required documents.

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

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.

2. 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

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

	A	B	C	D	E	F	G	H	I	J
1	Document Name	Document Tag	Version	Document Milestone	Area of Work	Activity Group				
2	605304 Schedule Narrative 05 Sep 24.PNG	Schedule Narrative	3	Project Milestone General	Contract/F	Project Milestones				
3	605304 Right of Way Plans 2 10 Sep 24.PNG	75% Right of Way Plans	2	Submittal	75%	Right of Way State				
4	Right of way proposed plans.PNG	Other	3	Submittal	75%	Right of Way State				
5	605304 Right of Way Plans 10 Sep 24.PNG	75% Right of Way Plans	1	Submittal	75%	Right of Way State				
6	Pre-25% Design package.PNG	Pre-25% OTS Conceptual	1	Submittal	Pre-25%	Design				
7	75% Design Package.PNG	75% Design Package	2	Submittal	75%	Design				
8	Supporting Document.PNG	25% Design Package	2	Approval	25%	Design				
9	25% Design package.PNG	25% Design Package	2	Approval	25%	Design				
10	Impact Analysis.PNG	Historic/Archaeology - Fe	1	Review Co	25%	Environment				
11	State Register Review.PNG	Historic/Archaeology - Fe	1	Review Co	25%	Environment				
12	Public Notice.PNG	Pre-25% OTS Conceptual	1	Submittal	25%	Design				
13	Project Status Sheet Report (5).pdf	75% Design Package	1	Submittal	75%	Design				
14	External.png	Schedule Narrative	2	Project Milestone General	Contract/F	Project Milestones				
15	Internal.png	Schedule Narrative	2	Project Milestone General	Contract/F	Project Milestones				
16	image001.png	Schedule Narrative	2	Project Milestone General	Contract/F	Project Milestones				
17	Screenshot 2024-08-21 at 1.17.45â€ PM.png	Schedule Narrative	1	Project Milestone General	Contract/F	Project Milestones				
18	PINFO UAT TEST 1.pdf	Other	2	Submittal	25%	Procurement				
19	PINFO UAT TEST.pdf	Other	1	Submittal	25%	Procurement				
20	sample test MSeExcel.xlsx	DPH - Response to Public	1	Project Milestone	25%	Design				
21	sample test MSWord document.docx	DPH - Public Comments	1	Project Milestone	25%	Design				
22	123456 Markup Summary 6-12-2024.pdf	25% Design Package	1	Review Co	25%	Design				

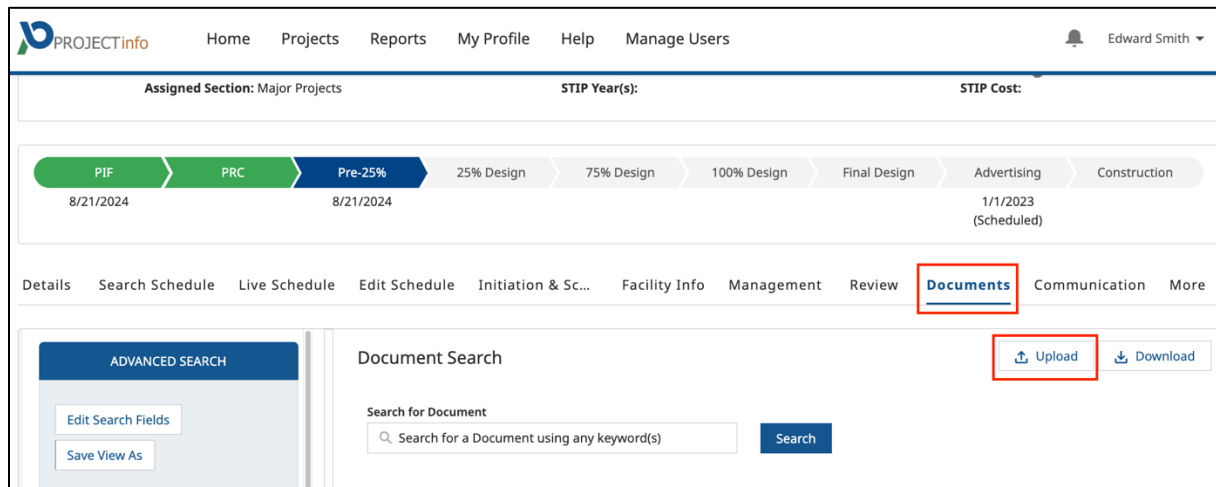
4.12.2 Uploading Documents

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

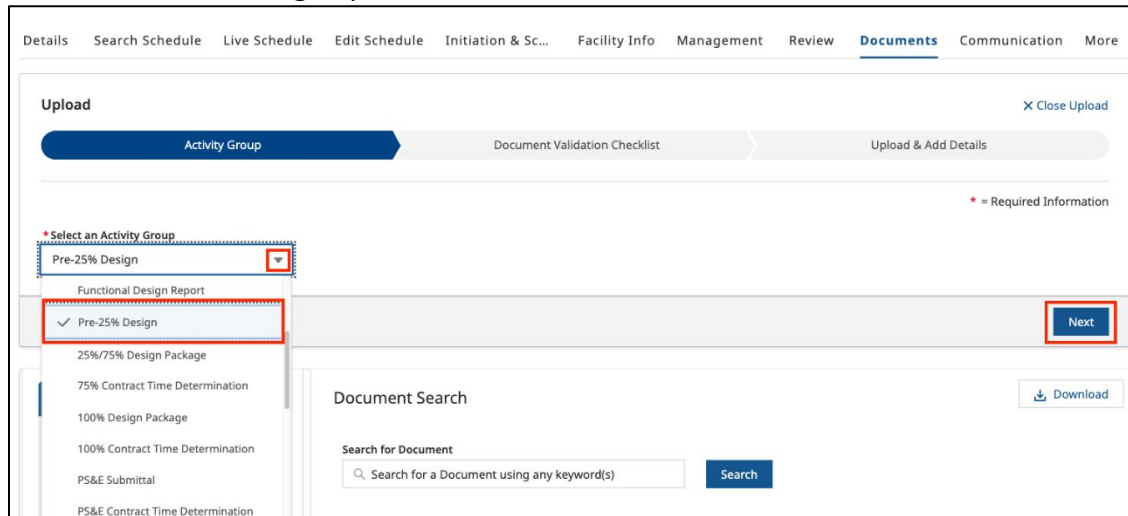
Note: For any errors in document tag selection or upload of document(s), please consult the Project Manager.

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

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



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



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

Upload

Close Upload

Activity Group

Document Validation Checklist

Upload & Add Details

Selected Activity Group: Pre-25% Design

Please complete the document validation checklist to proceed.

* 1) Files to be reviewed shall be submitted in .pdf format. All other file types shall be submitted as required by MassDOT.

Complete

NA

* 2) Files to be reviewed shall use the required File Naming Convention.

Complete

NA

* 3) All PDF files shall be "flattened" prior to submitting. Files submitted that are not "flattened" or "is certified" pdf will be rejected.

Complete

NA

* 4) For preparation of Plans, when plotting drawings to .pdf, set EPDFSHX to 0 within AutoCAD prior to plotting.

Complete

NA

* 5) Highway plan sets shall consist of a single volume and be submitted as a single PDF, with everything shown in black and white, except utilities should be in color on Utility sheets only.

Complete

NA

* 6) AutoCAD files to be uploaded as one zip file.

Complete

NA

* 7) Designer shall submit Response to Comments (RTC) in both RTC Markup Summary and RTC Submission file format.

Complete

NA

* 8) Required Draft Environmental Permits are submitted with the 75% Design Package.

Complete

NA

* 9) Designer has verified the Funding Categories with the Project Manager to be used for the Cost Estimate.

Complete

NA

Back

Next

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

PROJECT INFORMATION PORTAL USER GUIDE

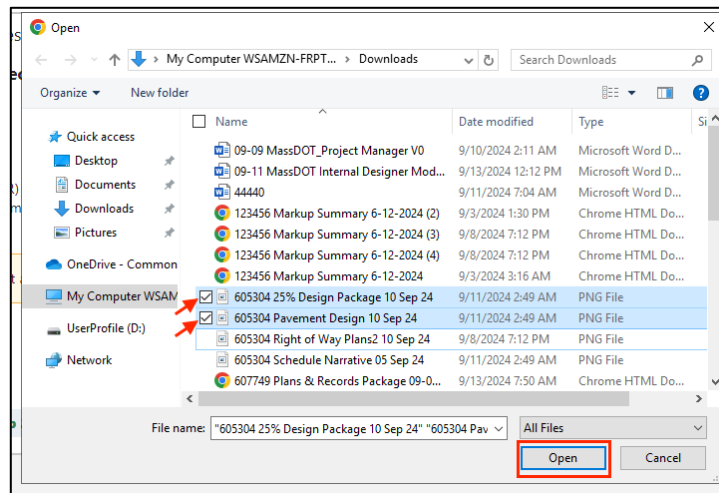
104

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

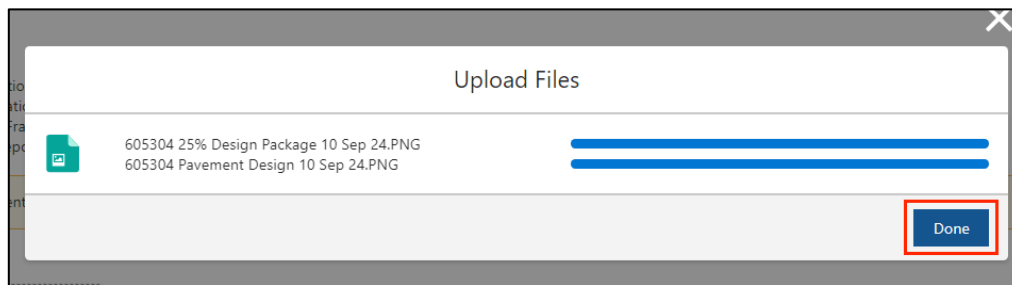
7. Upload Document(s) window opens up with a list of **Applicable Document(s) for Selected Activity Group**. Click on the **Upload Files** button or use **Or drop files**.

Note: Users can upload multiple files.

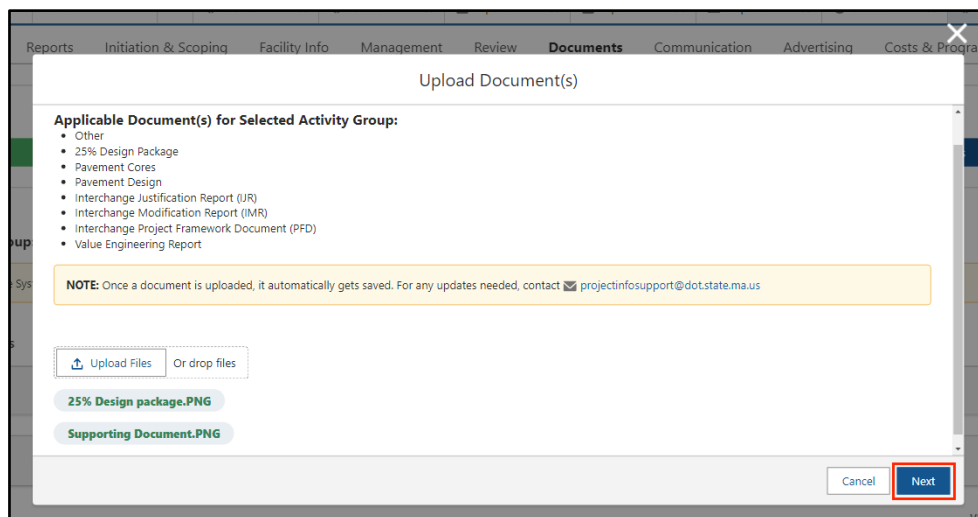
8. A File Explorer pop-up displays. Select the required document(s) and click the **Open** button.



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).

Note: Please contact the System Administrator if any updates are needed to the files uploaded below.

Uploaded Documents Upload

Document Name	Document Tag	Milestone	Document Category	Allow External Access ⓘ
Supporting Document.PNG	Select an Option	Select an Option	Select an Option	
25% Design package.PNG	Select an Option	Select an Option	Select an Option	

Back Save

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.

Uploaded Documents Upload

Document Name	Document Tag	Milestone	Document Category	Allow External Access ⓘ
Project Status Sheet Report (5).pdf	Other *Other Document	Select an Option	Select an Option	<input checked="" type="checkbox"/>
Project Status Sheet Report (4).pdf	Select an Option	Select an Option	Select an Option	<input checked="" type="checkbox"/>

(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.

Note: Please contact the System Administrator if any updates are needed to the files uploaded below.

Uploaded Documents Upload

Document Name	Document Tag	Milestone	Document Category	Allow External Access ⓘ
Supporting Document.PNG	25% Design Package	25%	Submission	
25% Design package.PNG	25% Design Package	25%	Submission	

Back Save

The Uploaded documents will be displayed under the Documents tab.

<div> Uploaded Document(s) <div> Export as CSV + Select More Fields to Display </div> </div>							
<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

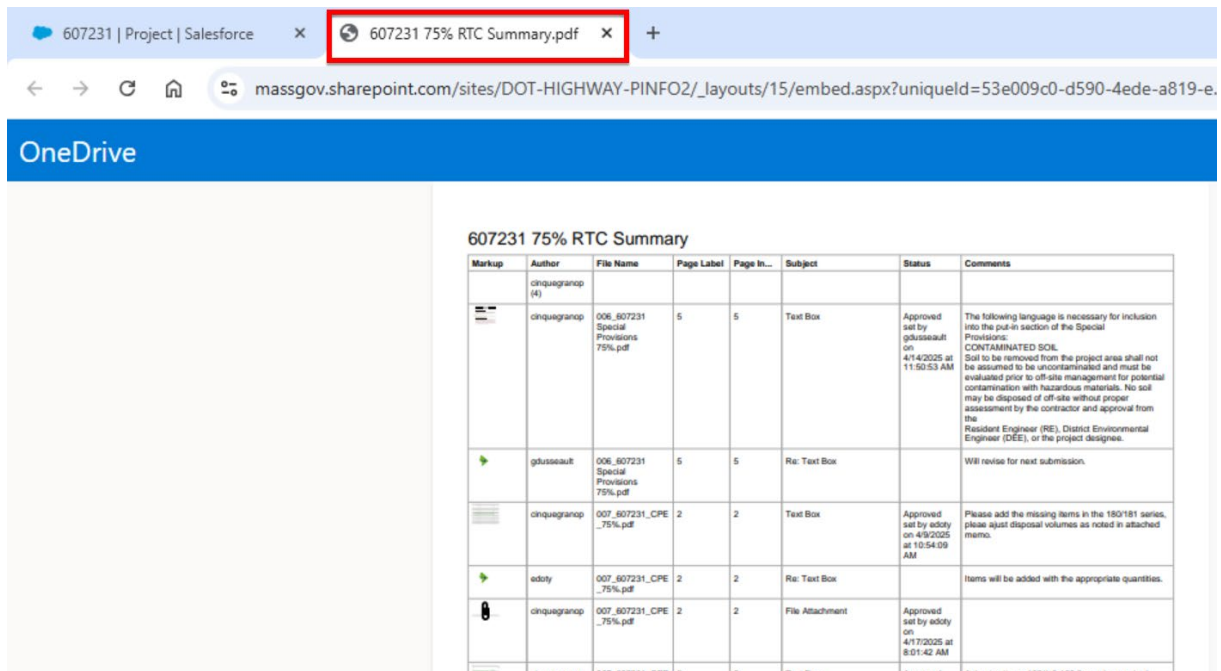
A Bell Notification is sent out to the Project Manager once the documents are successfully uploaded.

4.12.3 Previewing Documents

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

<div> Uploaded Document(s) <div> Edit Details Export as CSV + Select More Fields to Display </div> </div>								
<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.

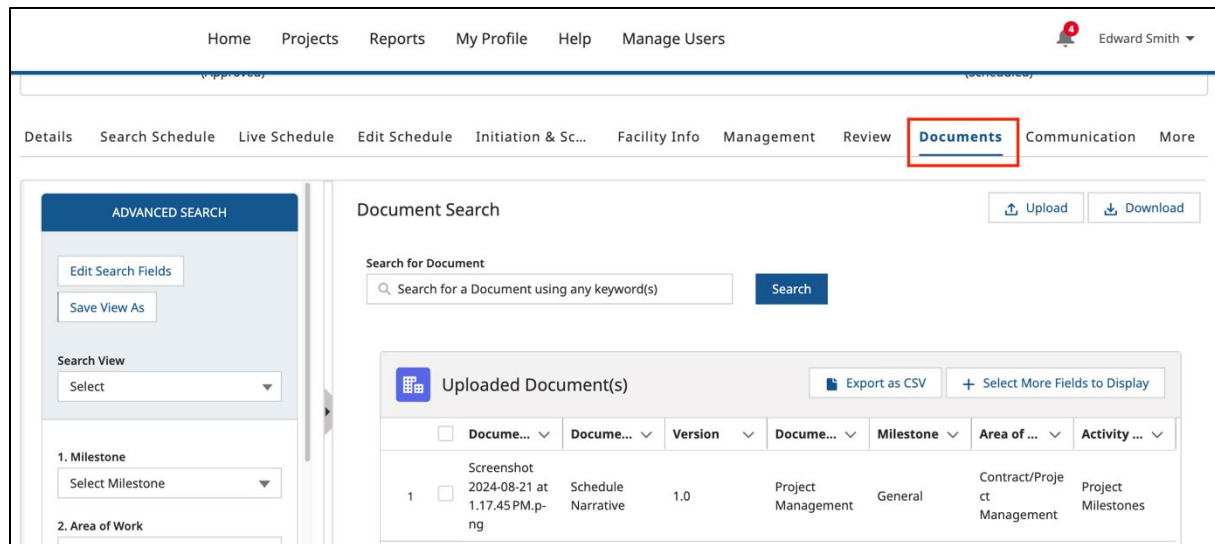


4.12.4 Downloading Documents

Users can download the documents from the Documents tab.

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

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



- 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 'Advanced Search' panel is visible with various filters. The '3. Activity Group' filter is selected as '25% Design Package'. The 'Search' button is highlighted with a red box. On the right, the 'Document Search' results are displayed under the 'Uploaded Document(s)' section. The table lists documents with columns: Document Name, Document Tag, Version, Document Category, Milestone, Area of Work, and Activity Group.

	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	PINPO UAT TEST 1.pdf	Other	2.0	Submission	25%	Procurement Phase	RFQ
8	PINPO UAT TEST.pdf	Other	1.0	Submission	25%	Procurement Phase	RFLOI

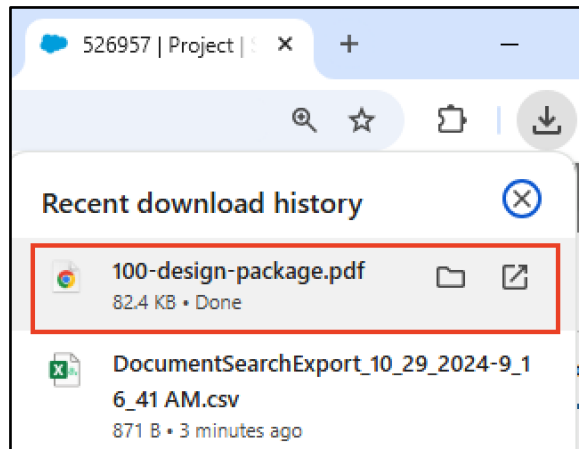
The list of documents within the selected activity group will be displayed under the **Uploaded Document(s)** section.

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

The screenshot shows the 'Document Search' interface with the 'Uploaded Document(s)' section. The table lists documents with checkboxes next to the 'Document Name' column. The 'Download' button is highlighted with a red box.

	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

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 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.

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

6.2 Schedule Definitions

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














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

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</i> (FS), <i>Finish to finish</i> (FF), <i>Start to start</i> (SS), and <i>Start to finish</i> (SF).</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	<p>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>.</p>
Lead	<p>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.</p>
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