MassDOT Project Information Portal

User Guide

V 1.1

Table of Content

Version History

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

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

Designers Editing Live Schedule:

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

Document Management:

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

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

1. Purpose of this Guide

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

2. Introduction

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

<table>
<tr><th>Role(s)</th><th>Responsibilities/Activities</th></tr>
<tr><td>External Design Lead Contact</td><td>

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

Managing External Design Lead Contact’s Access
Accept
Deny
Deactivate
</td></tr>
</table>

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.

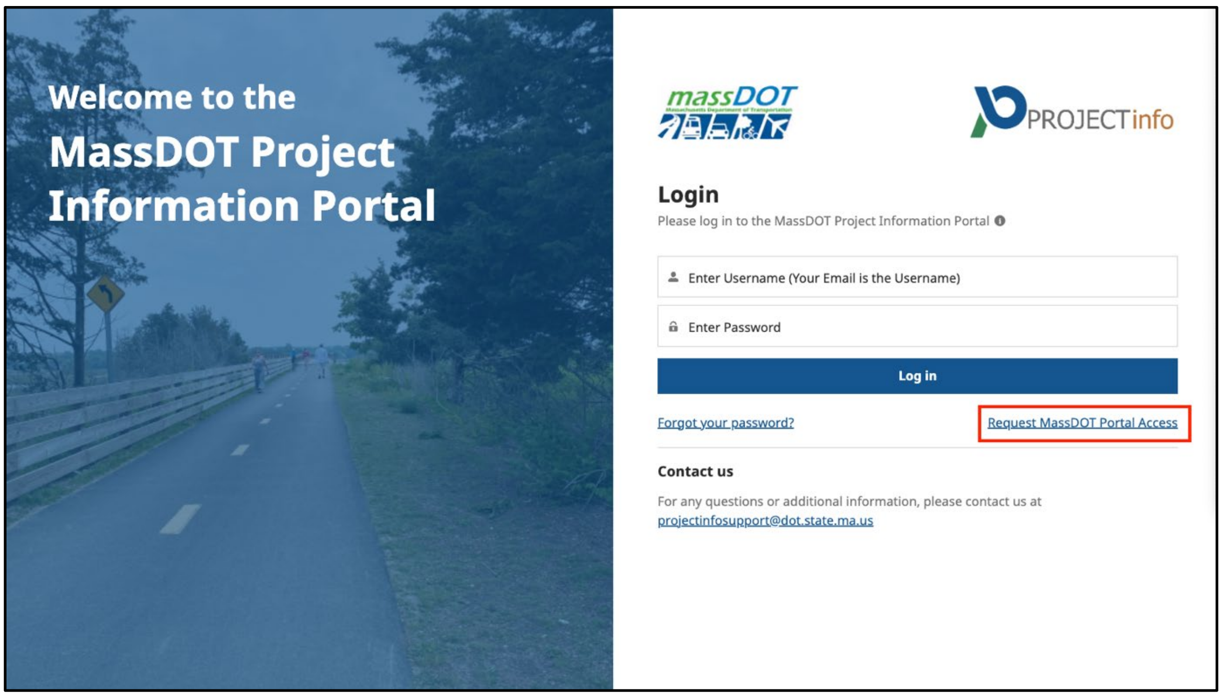
For all other users:

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:

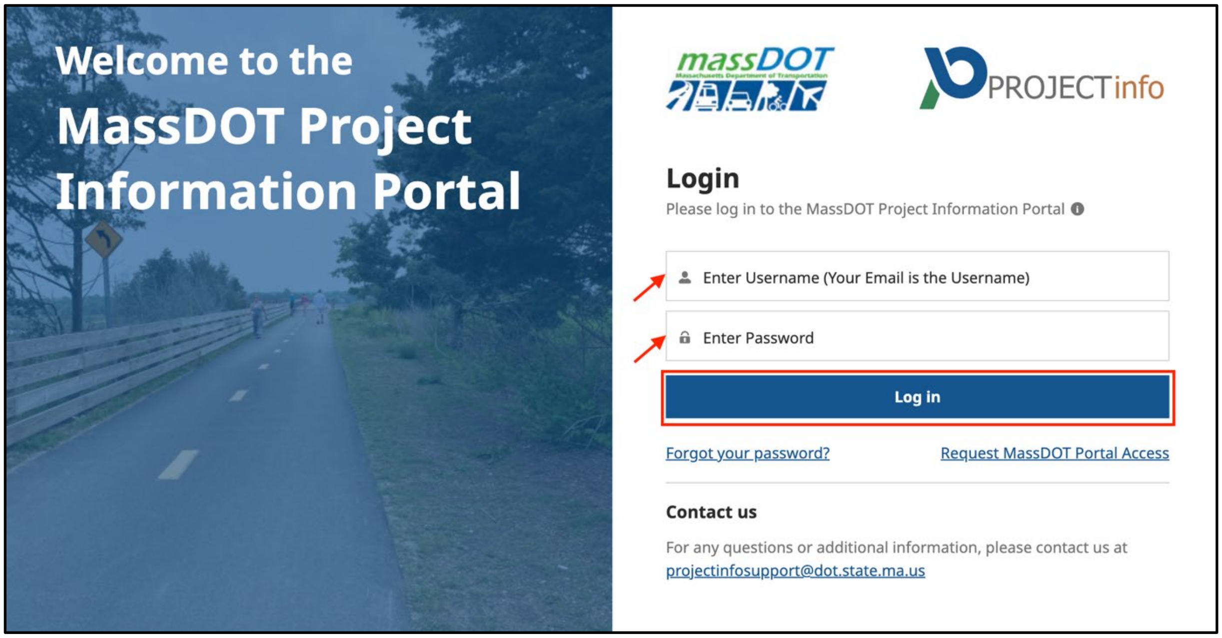
- To cancel the request, the users can click the **X** icon or **Cancel** button.
- In case of any questions or more information, users can contact the support team via projectinfosupport@dot.state.ma.us

3.2 Logging In

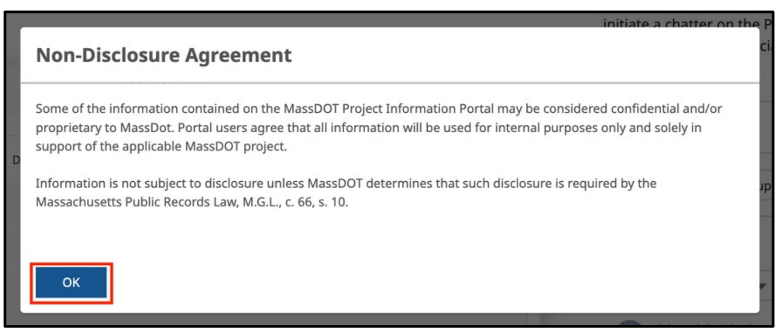
Prerequisite: User access to the Project Information Portal is approved, and a login password is set.

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

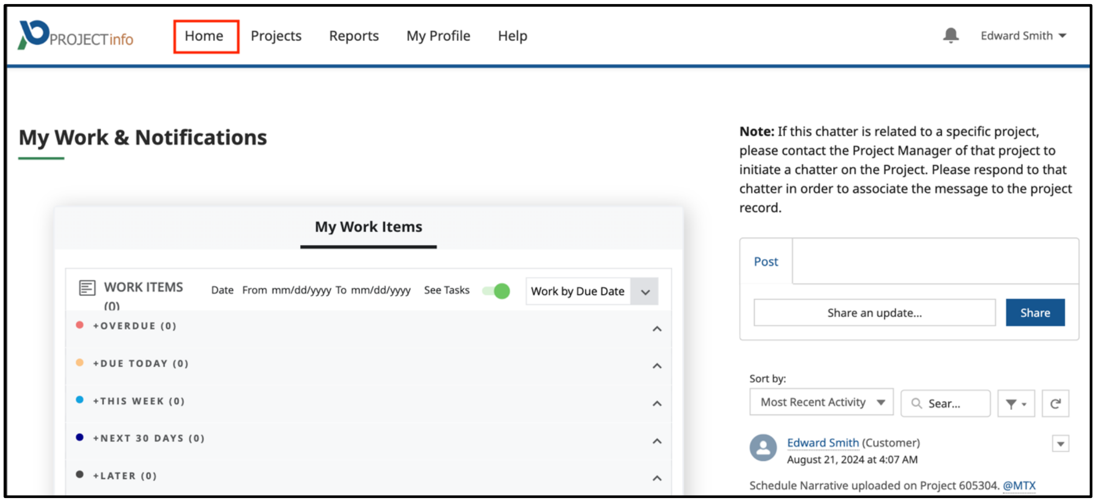
1. Go to the **MassDOT Project Information Portal** login page.
2. Enter **Username** and **Password** and click **Log in**.



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



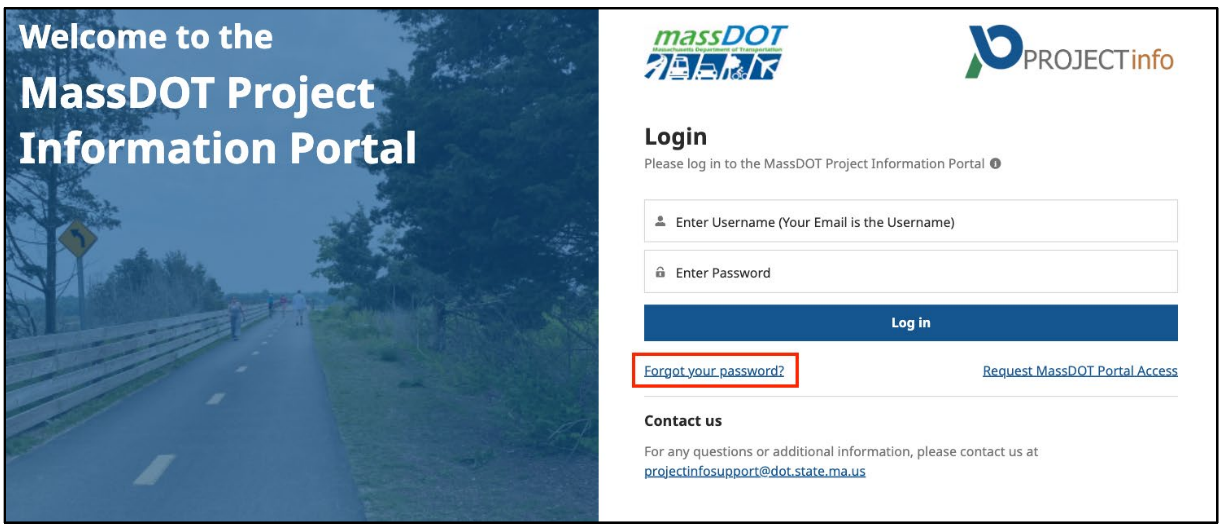
4. The user will be directed to the **Home** page



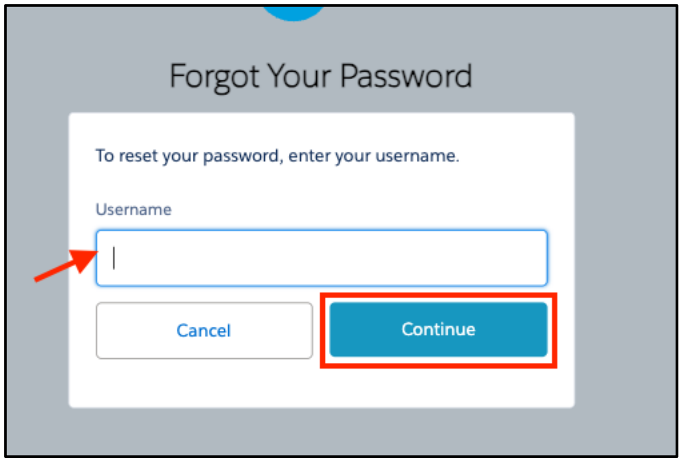
3.3 Forgotten Password

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

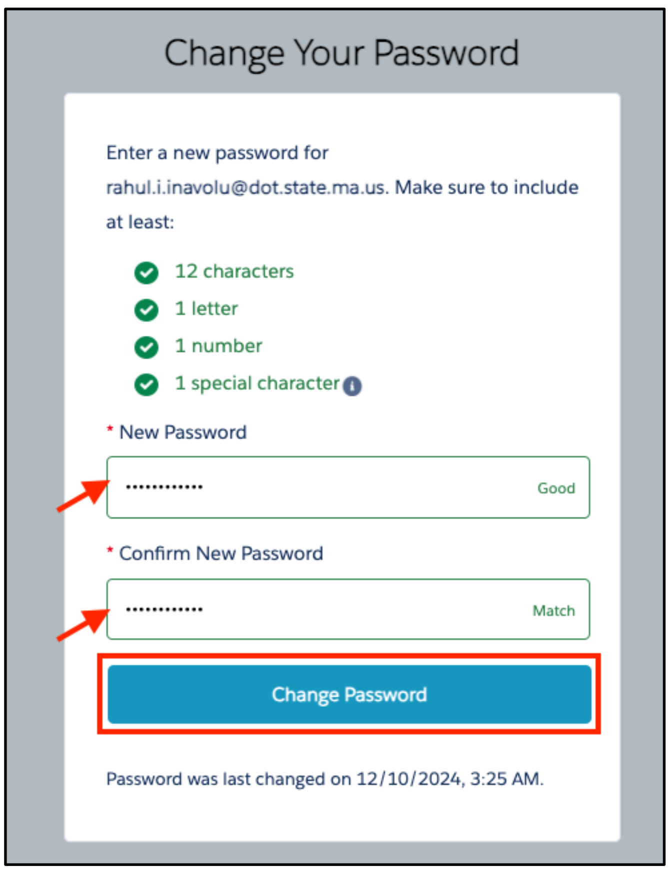
1. Go to the **MassDOT Project Information Portal** login page
2. Click **Forgot your Password**?



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



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**.



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.

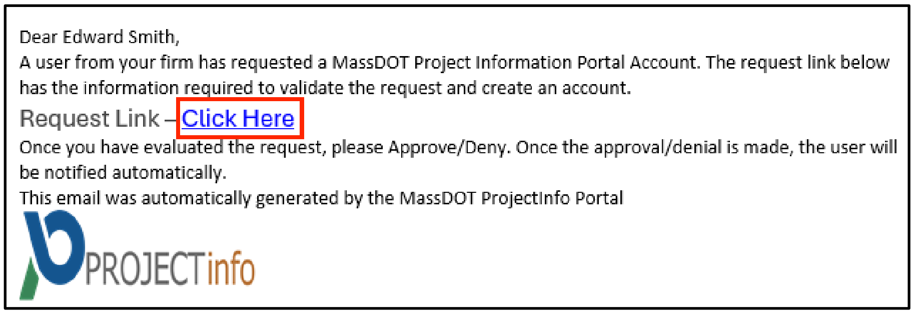
Note: A Design Firm Admin can perform all roles that an External Design Lead Contact can.

4.1.1 Design Firm Admin Reviewing the Request

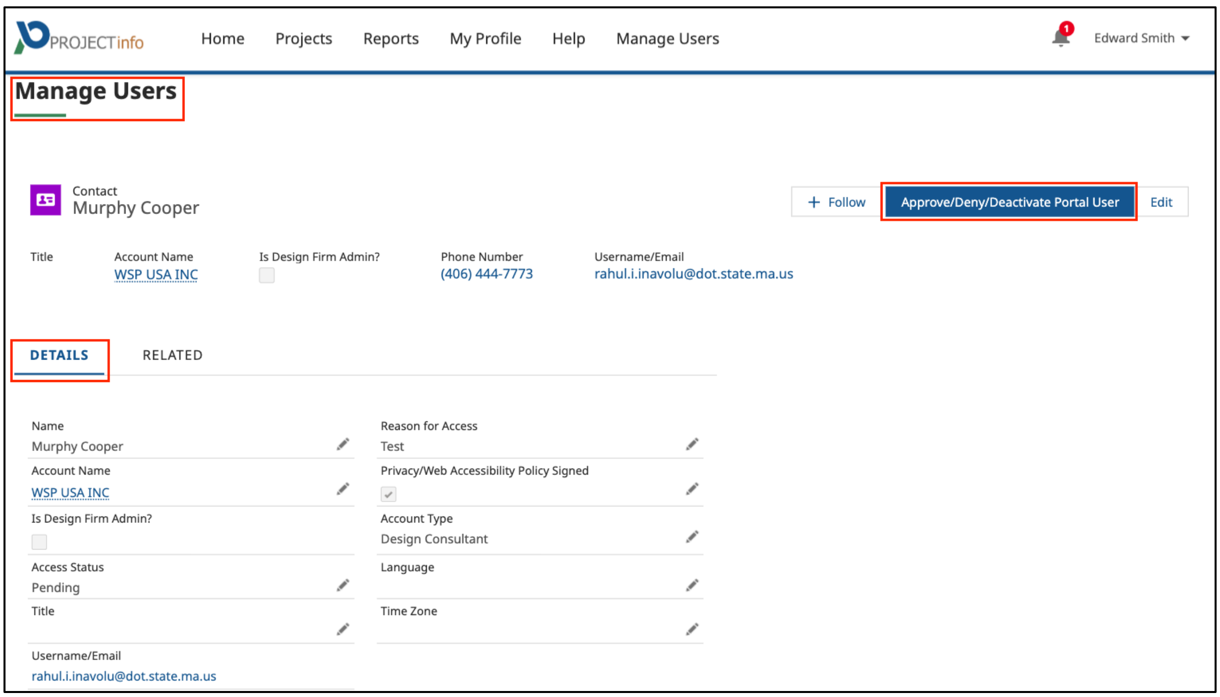
The **Design Firm Admin (DFA)** will receive an **email notification** containing a link to review the **access requests** for users in their **Design Firm**. This is to ensure that only authorized personnel from the Design Firm can access **Project Information** and manage tasks on the MassDOT Project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

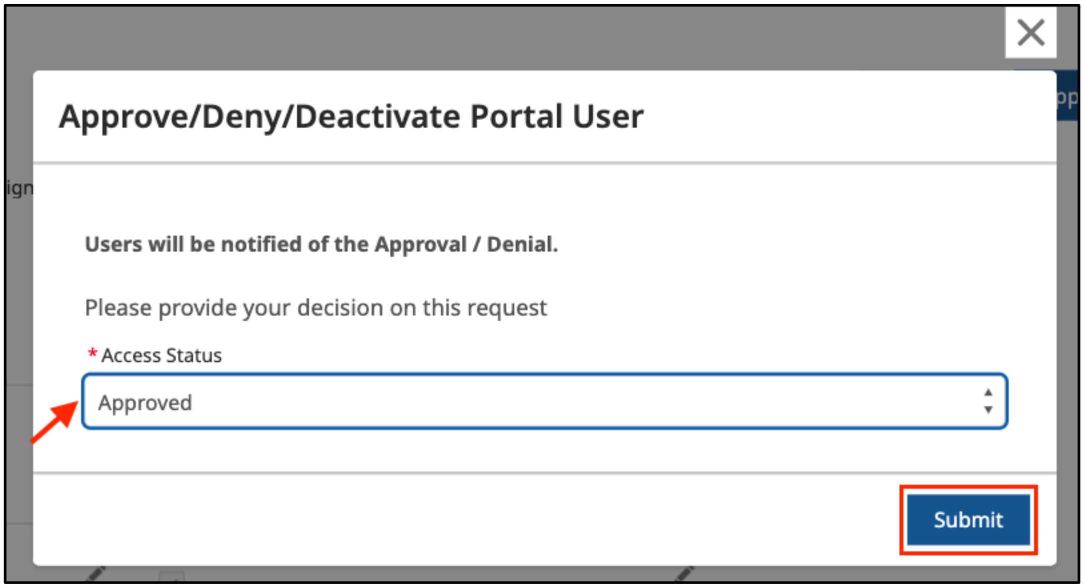


2. Users will be redirected to the MassDOT ProjectInfo Portal Login page. For more details on logging in, follow the steps outlined in the Logging In section.
3. Once logged in, Review the **Contact** details e.g., **Name**, **Email**, **Reason for Access** etc.
4. Click the **Approve/Deny/Deactivate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

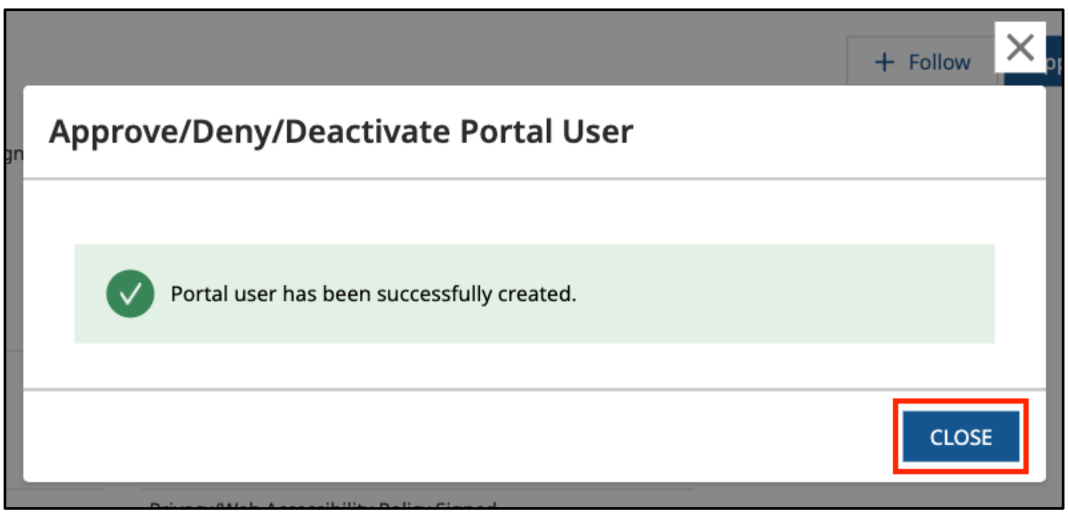


5. An **Approve/Deny/Deactivate Portal User** pop-up displays.

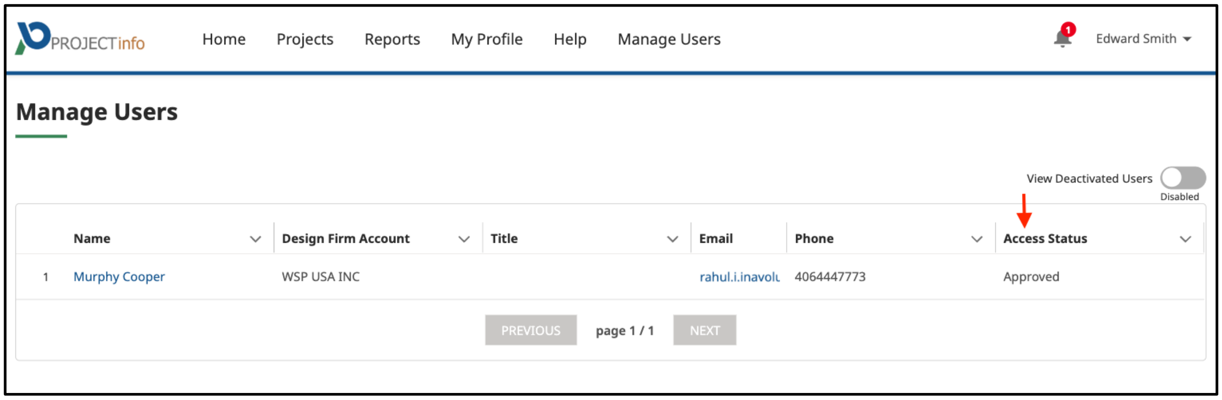
6. If the details are valid, select **"Approved"** from the dropdown list and click the **Submit** button. Else, if the details are invalid, select **"Decline"** and click **Submit**.



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.

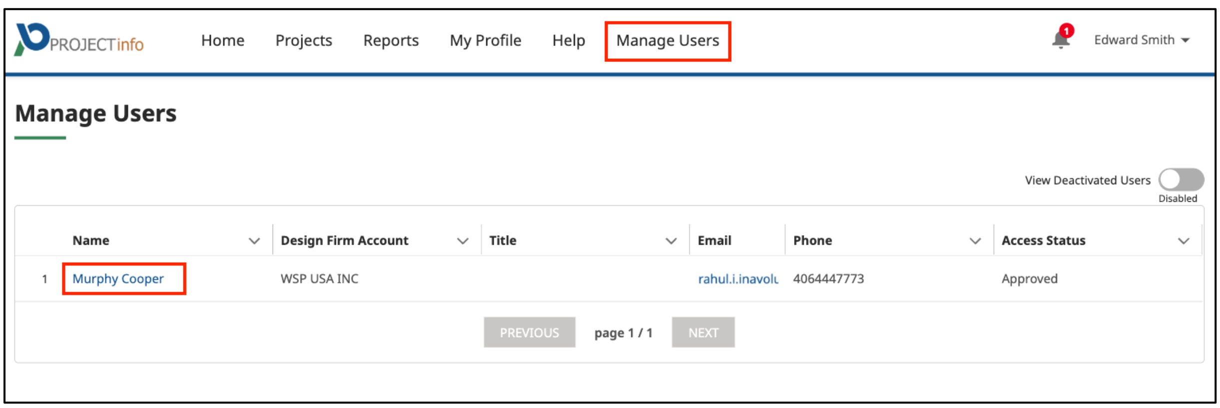


4.1.2 Design Firm Admin Deactivating the User

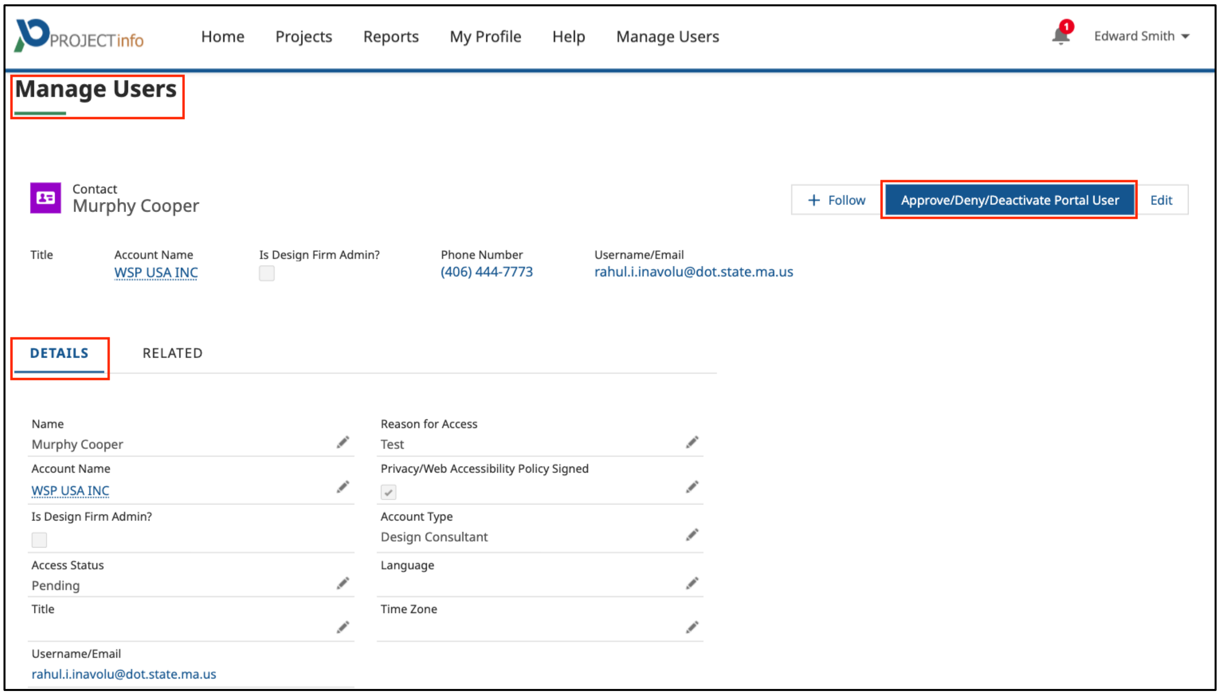
The **Design Firm Admin** has the authority to **deactivate External Design Lead Contact(s)** when they are no longer employed by their firm or associated with **MassDOT**.

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

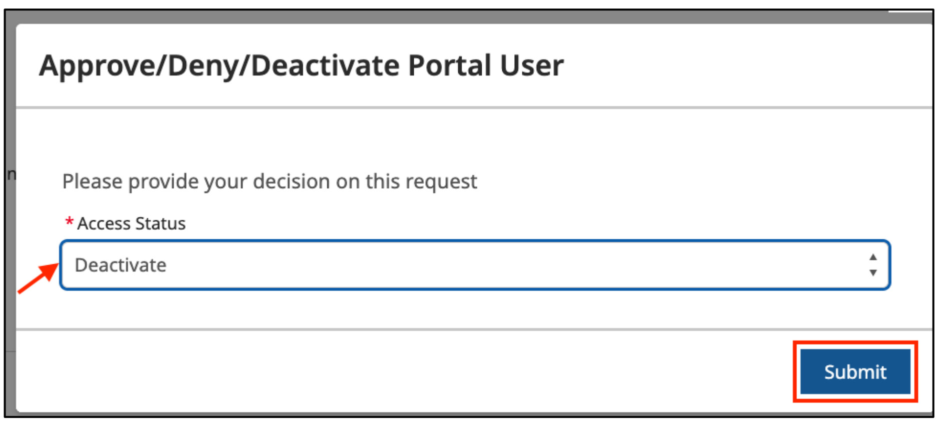
1. Log on to the **MassDOT Project Information Portal**
2. Go to the **Manage Users** tab
3. Click on the **Name** of the user to be deactivated



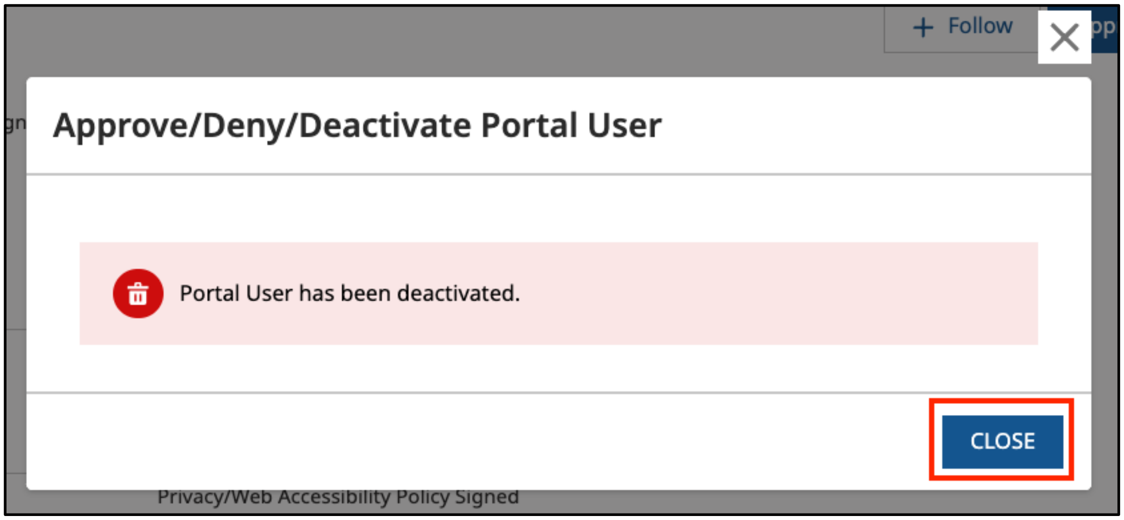
4. Review the **Contact** details e.g., **Name**, **Email**, **Reason for Access** etc.
5. Click **Approve/Deny/Deactivate Portal User**.



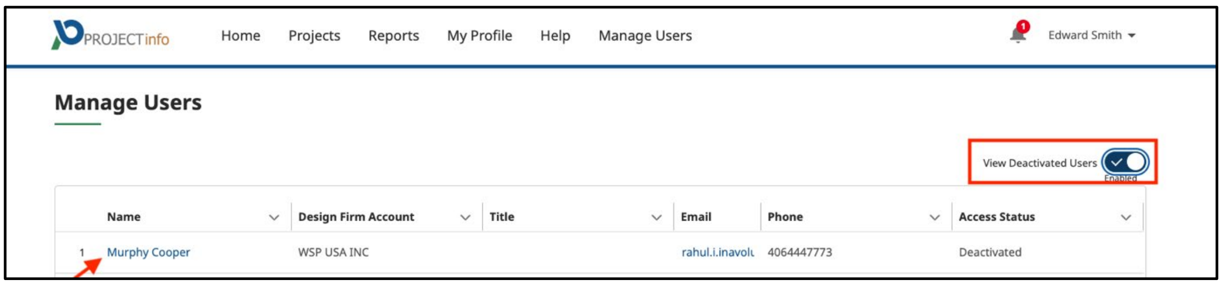
6. Select **Deactivate** from the **Access Status** dropdown.
7. Click **Submit**.



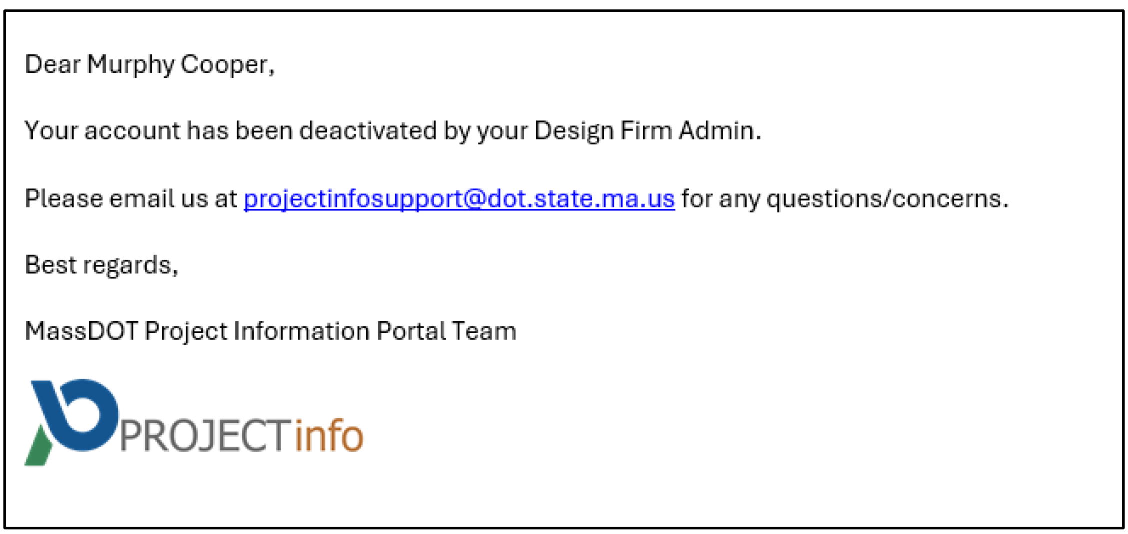
8. A message **'Portal User has been deactivated'** displays.
9. Click the **Close** button.



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:


Dear Murphy Cooper,

Your account has been deactivated by your Design Firm Admin.

Please email us at projectinfosupport@dot.state.ma.us for any questions/concerns.

Best regards,

MassDOT Project Information Portal Team

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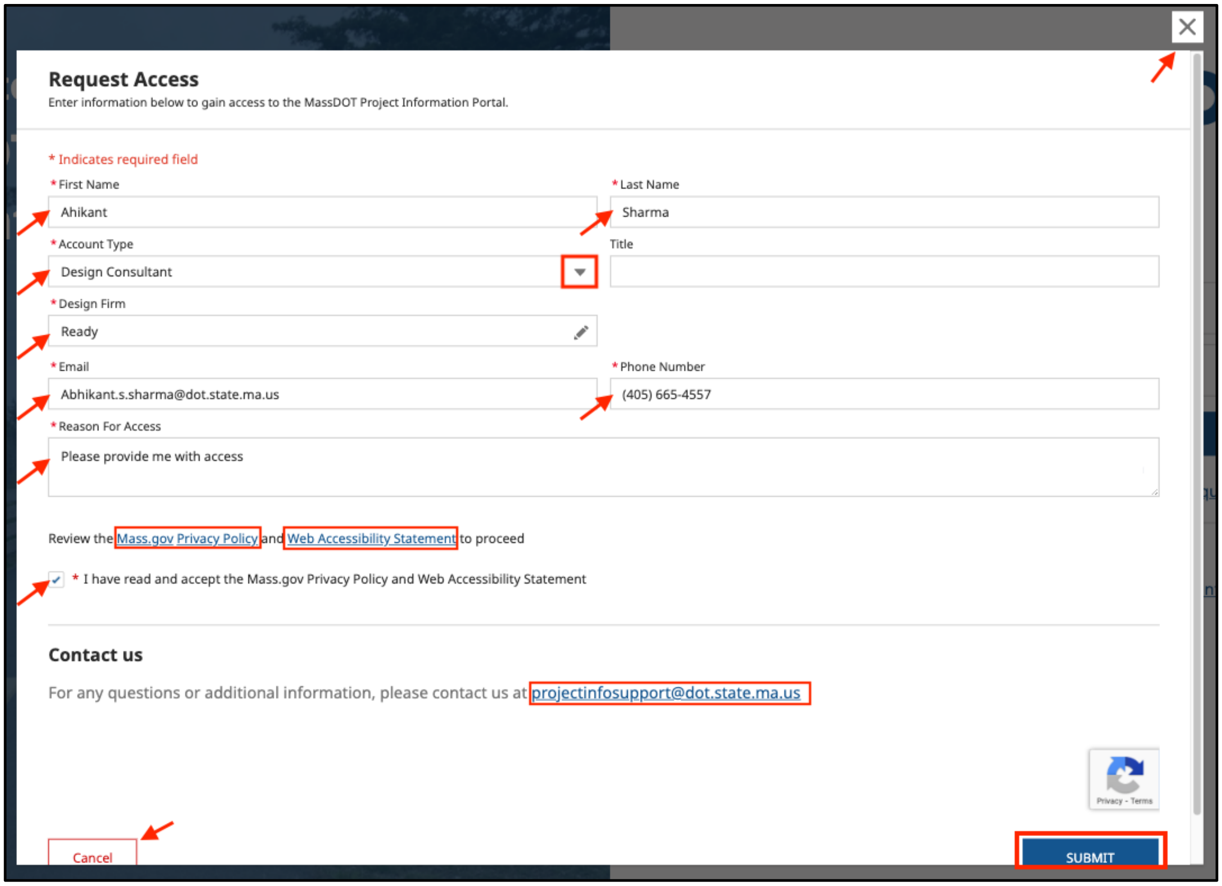
4.2. External Design Lead Contact Role

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

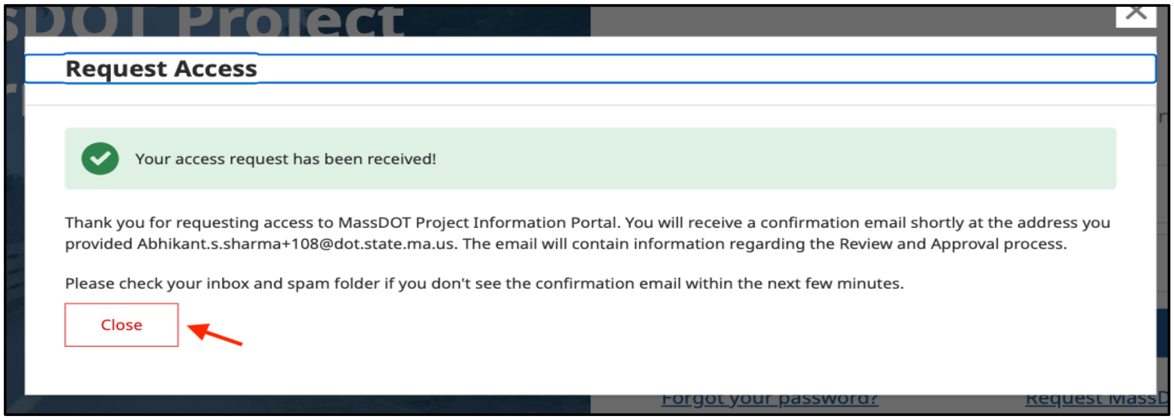
The **External Design Lead Contact** will navigate to the Portal Login Page via the Highway Website.

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.



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.

> Thank you for requesting access to the MassDOT Project Information Portal. Our team will review your request to ensure it meets our access criteria. This process may take up to several days, depending on the volume of requests.
>
> Please note that the ProjectInfo Portal is built on a Salesforce Platform. You will receive an email from the MassDOT Salesforce System Administrator with further instructions once your request is approved.
>
> In the meantime, if you have any questions or need assistance, please do not hesitate to reach out to our support team at projectinfosupport@dot.state.ma.us.
>
> Best regards,
>
> MassDOT Project Information Portal Team

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

4.2.1 External Design Lead Contact Account Setup

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

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

To set up the password, follow the steps below:

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

Dear Murphy Cooper,

We are pleased to inform you that your request for access to the MassDOT ProjectInfo Portal has been approved. Welcome aboard, we look forward to working with you. Here are the details you need to get started:

Access Details:

To get started, please click on the link below to create your password.

Once you click the link you will see another Salesforce page asking you to change your password. You can create one by typing it in the New Password text box and then typing it again into the Confirm New Password text box

You will notice that the password requirements are listed on the screen. As you type in your password, the bullets will fill in as you meet each requirement.

In addition to the criteria listed on the screen MassDOT encourages you to avoid the following:

- use of repeating, ascending, or descending character sequences (e.g., 12345, or abcde).
- including any part of your username or your firm name
- reusing previous passwords

Once you have confirmed your password, click the Change Password button

Link: Change Password

MassDOT ProjectInfo Portal Link: Click here This is the link to access the ProjectInfo Portal.

Username: rahul.i.inavolu@dot.state.ma.us Your username is the email address you entered in the ProjectInfo Portal Request Access form.

Once you have successfully logged into the ProjectInfo Portal, you will be on the My Work page, which is your home page in the portal. From the home page, click on the Help option to get information about using the portal.

If you have any questions about setting up your portal account or using the ProjectInfo Portal, do not hesitate to contact us at: projectinfosupport@dot.state.ma.us. Once again, we look forward to working with you!

Best Regards,

MassDOT Project Information Portal Team

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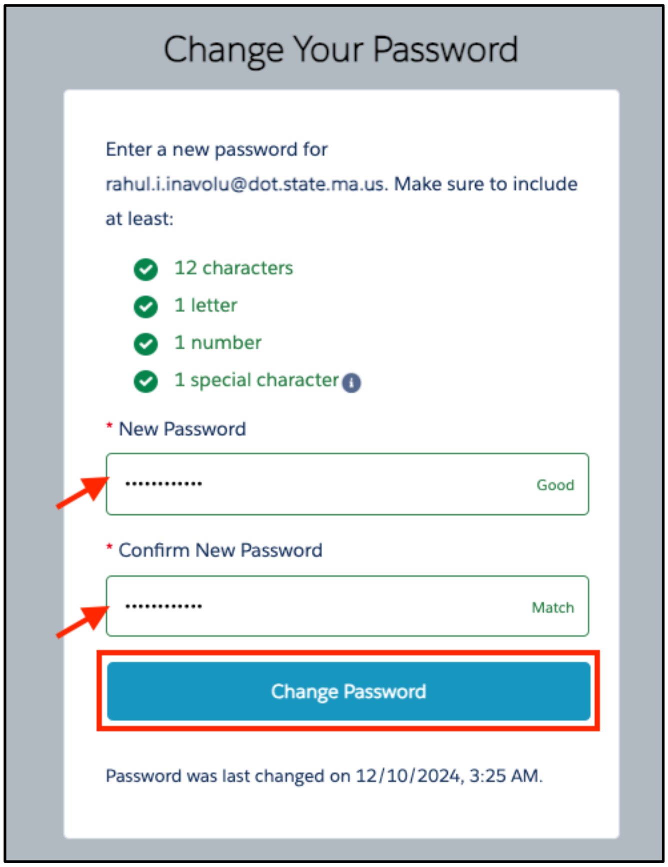
2. Users will be directed to the **Create Your Password** page.
3. **Enter** the **New Password**, then re-enter it in the **Confirm New Password** field.
4. Click the **Change Password** button.
5. Once the password is successfully set, the user will be automatically logged into the **MassDOT Project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

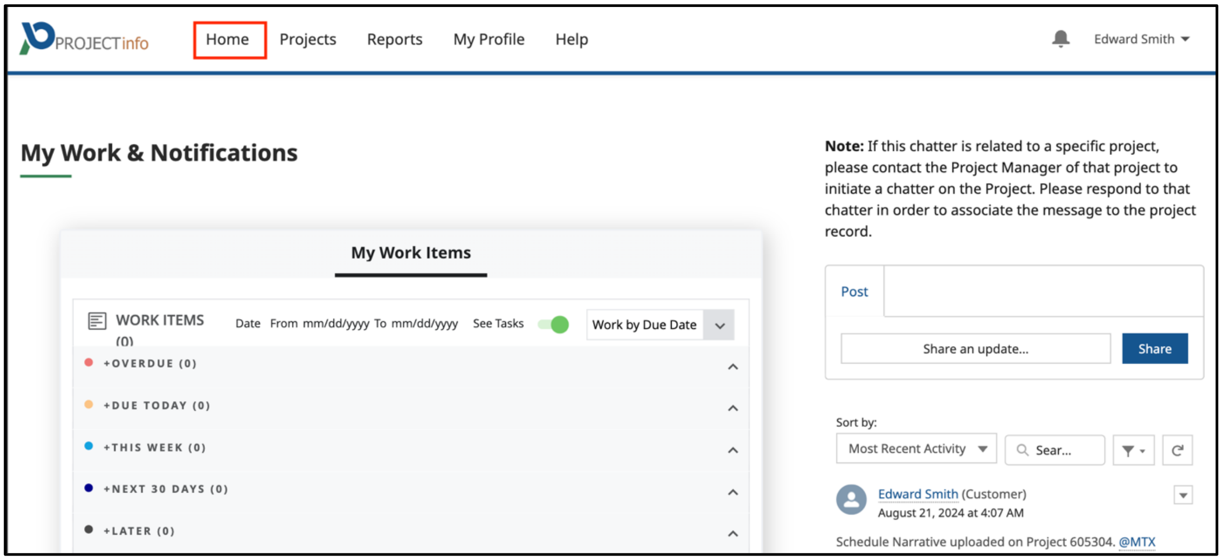


4.3. Home Tab

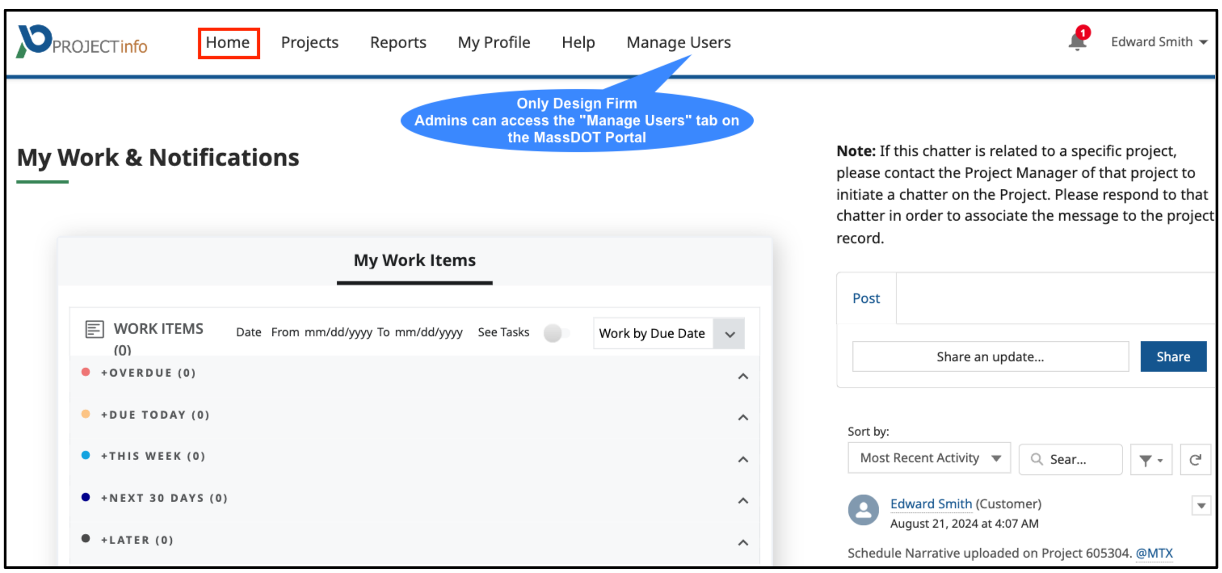
The image below illustrates the layout available for the External Design Lead Contact and Design Firm Admin respectively.

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):

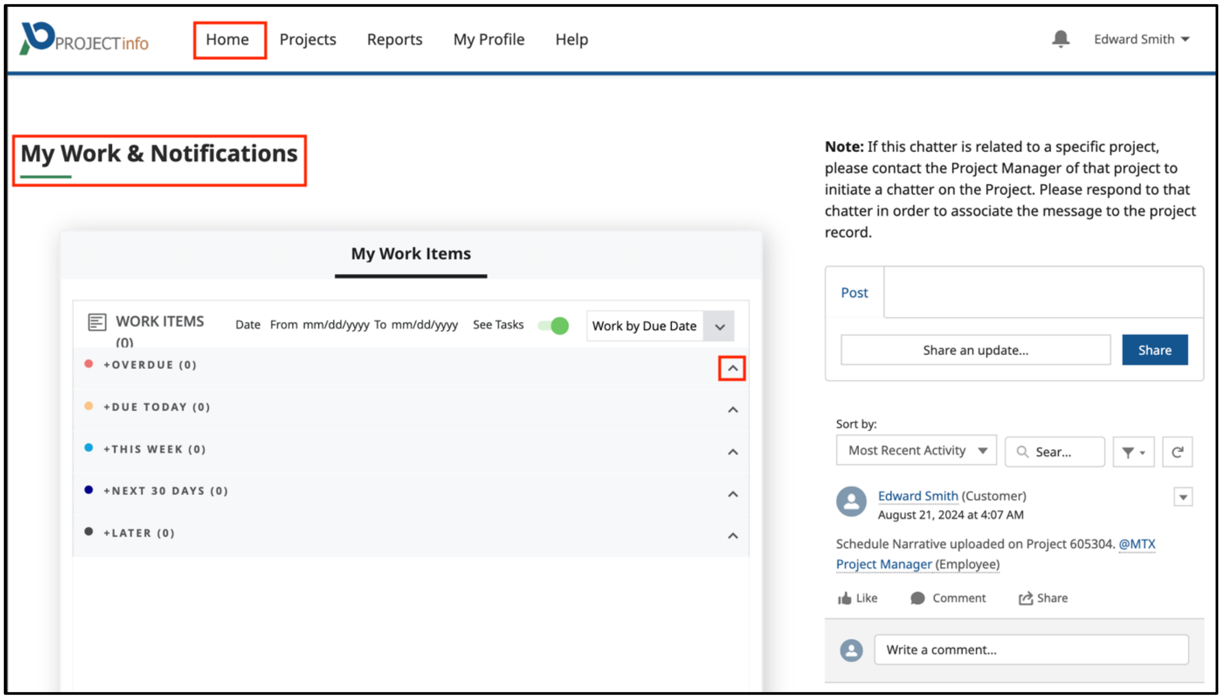


4.3.1 My Work Items

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**.

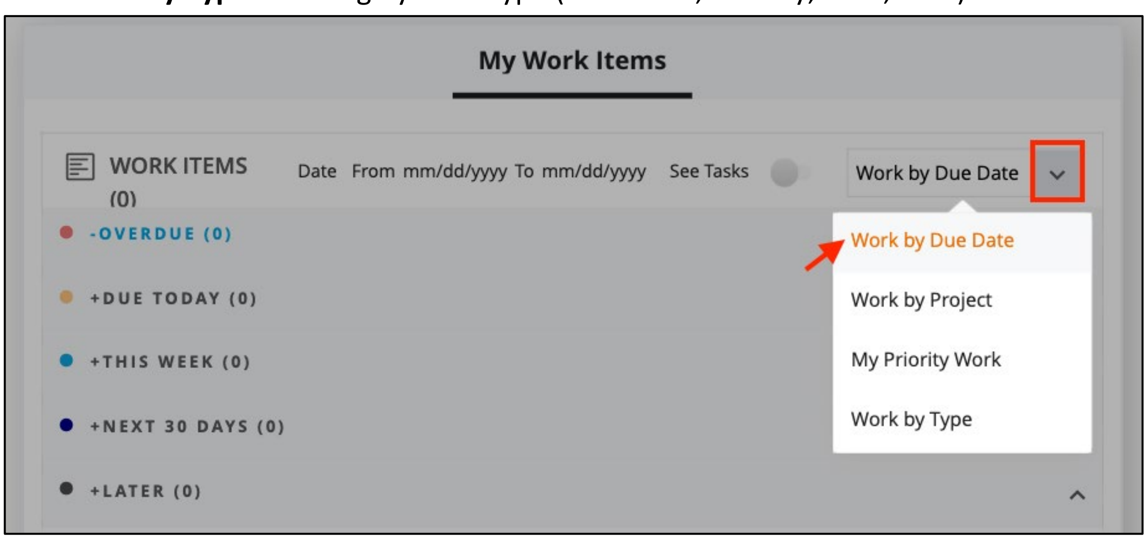
Note: Initially, no items are displayed in the **My Work Items** section. The My Work Items section serves as a starting checkpoint for the Users.



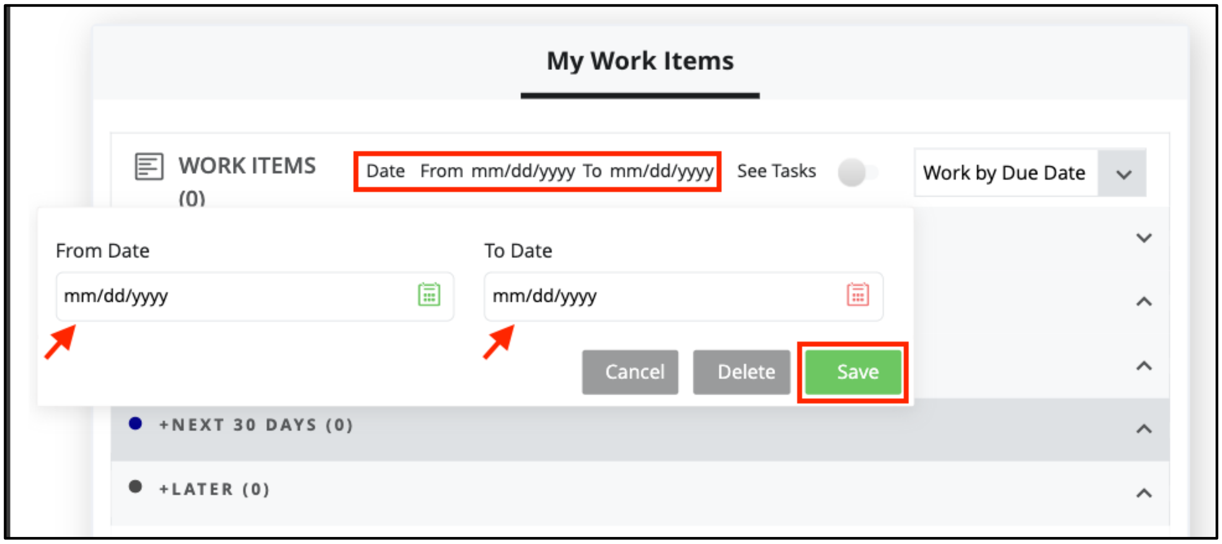
Users can customize **My Work Items** view by selecting the required type from the **Work by** drop-down list.

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

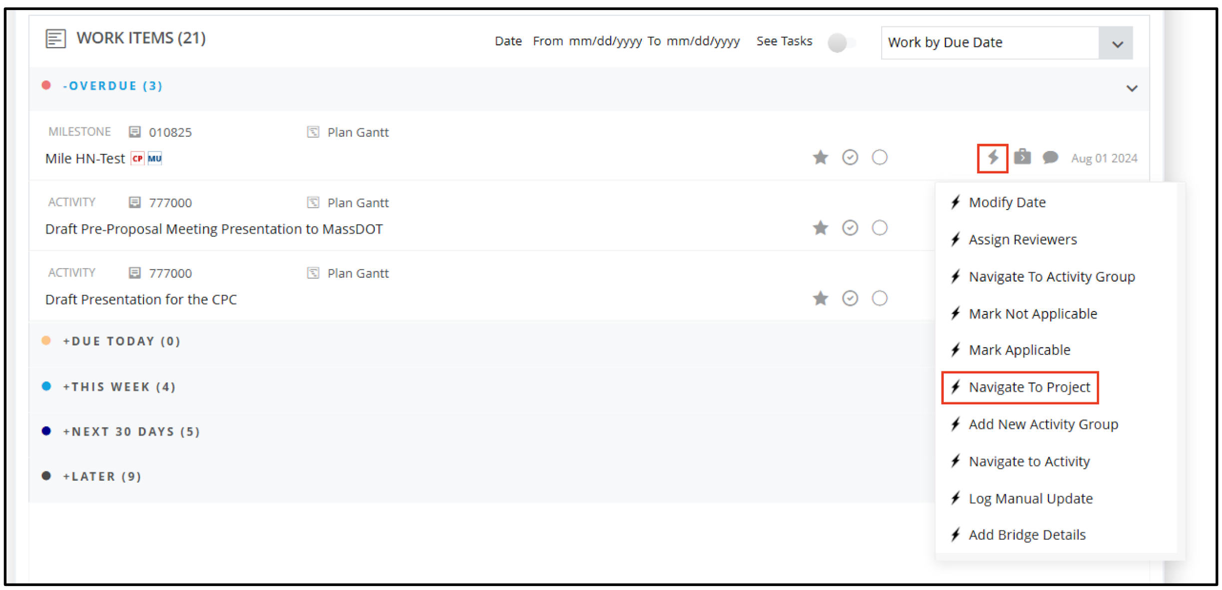
- **Work by Due Date:** Filtering Items based on period (as shown in this screenshot). Recommended Filter
- **Work by Project:** Filtering items associated with Projects that are assigned to a user
- **My Priority Work:** Filtering according to level of importance (Critical/High, Medium/Normal, Low,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



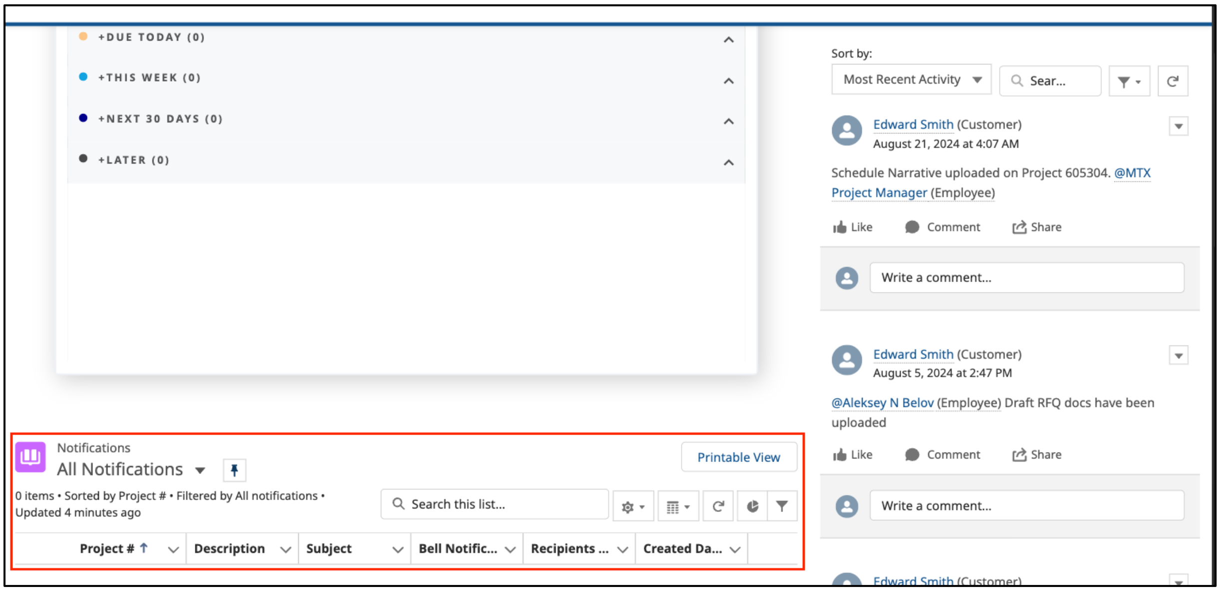
Each work item includes a lightning icon that provides access to **Quick Actions**. Click the lightning icon to reveal the list of actions. For example, to open a specific Project, select the **Navigate to Project** option from the list.

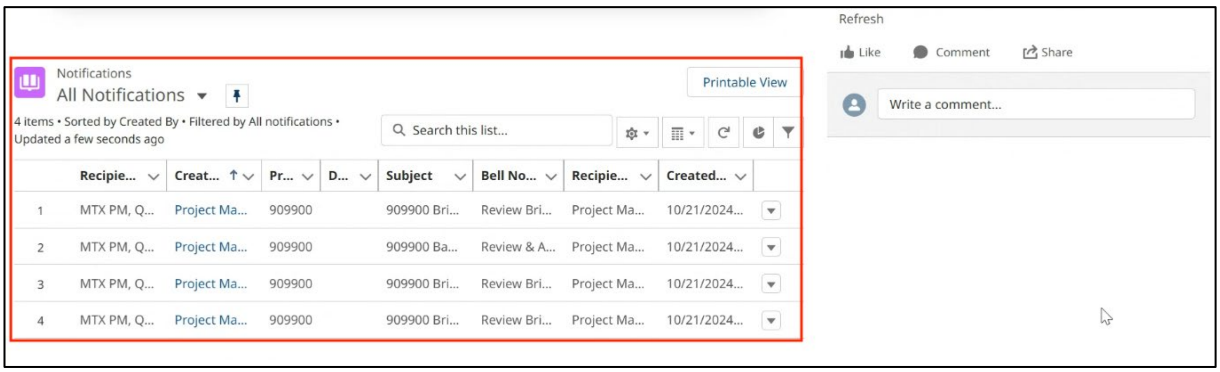


Users will be directed to the Project with which the activity is associated.

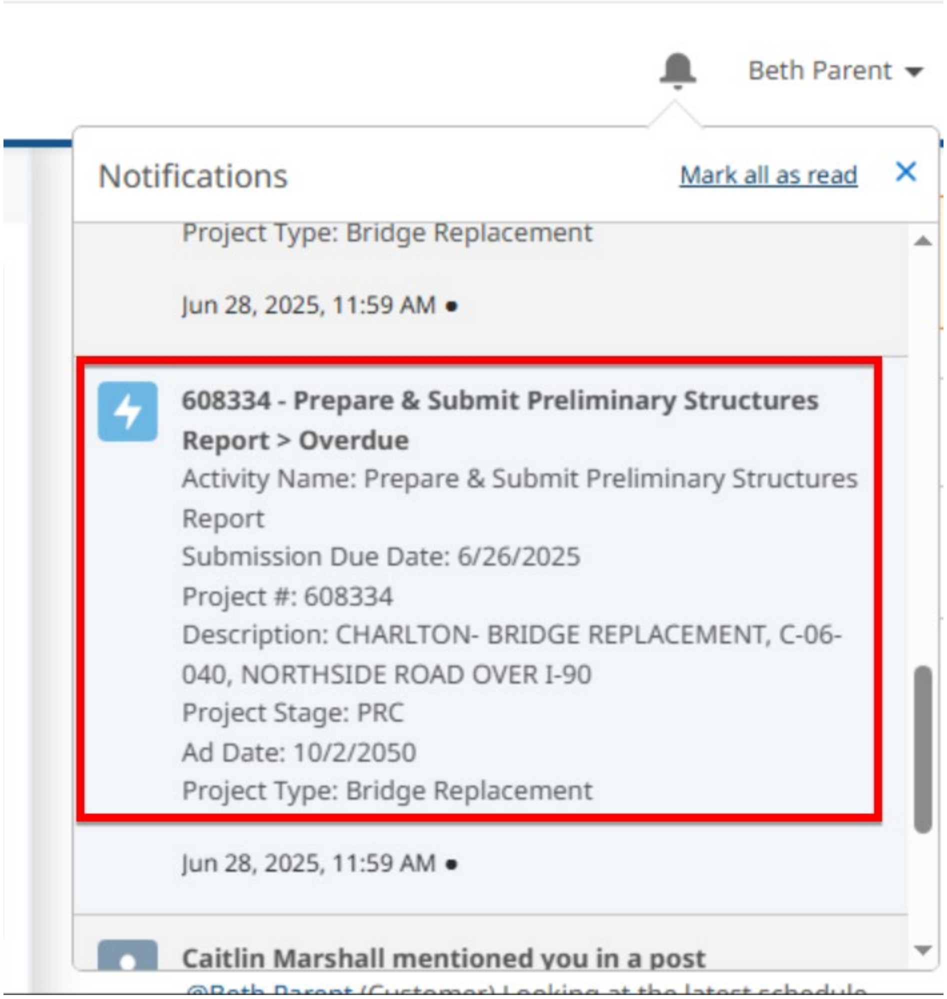
4.3.2 Notifications

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.





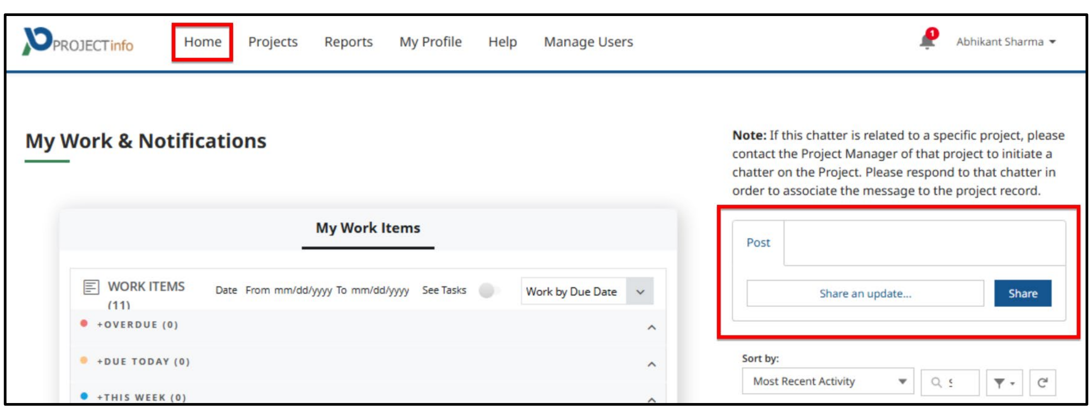
Users can also view the notification alerts from the Bell Notification button.



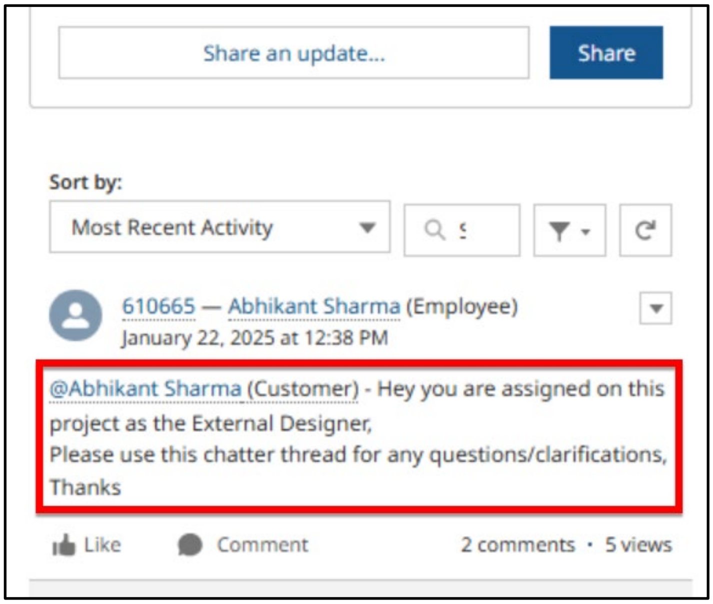
4.3.3 Chatter

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

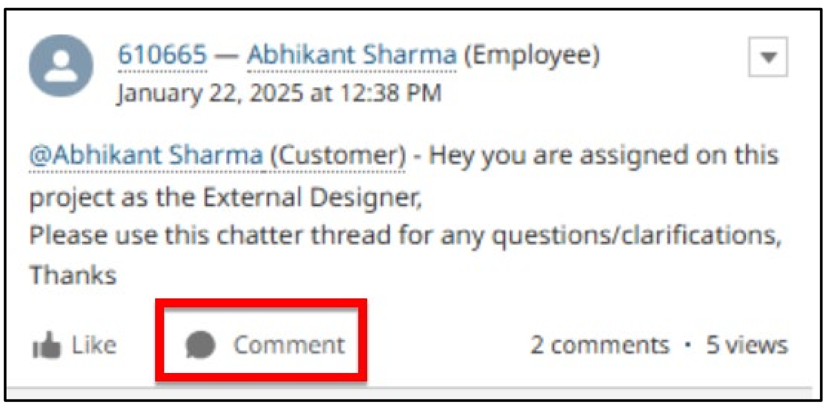
1. Go to the **Home** Tab and Locate Chatter section on the right side of the page.



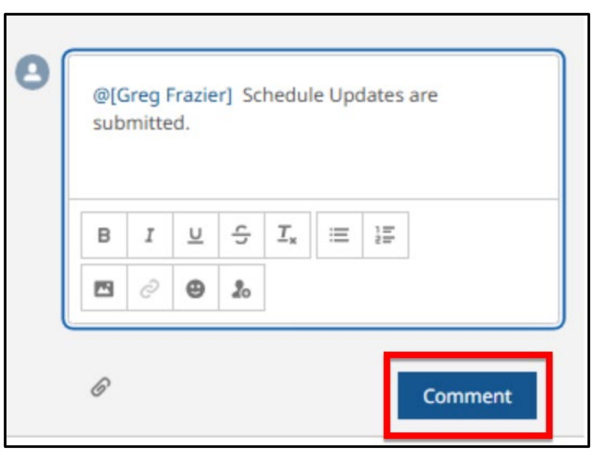
2. Scroll down and locate a **Chatter** posted by the Project Manager regarding Project assignment.



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

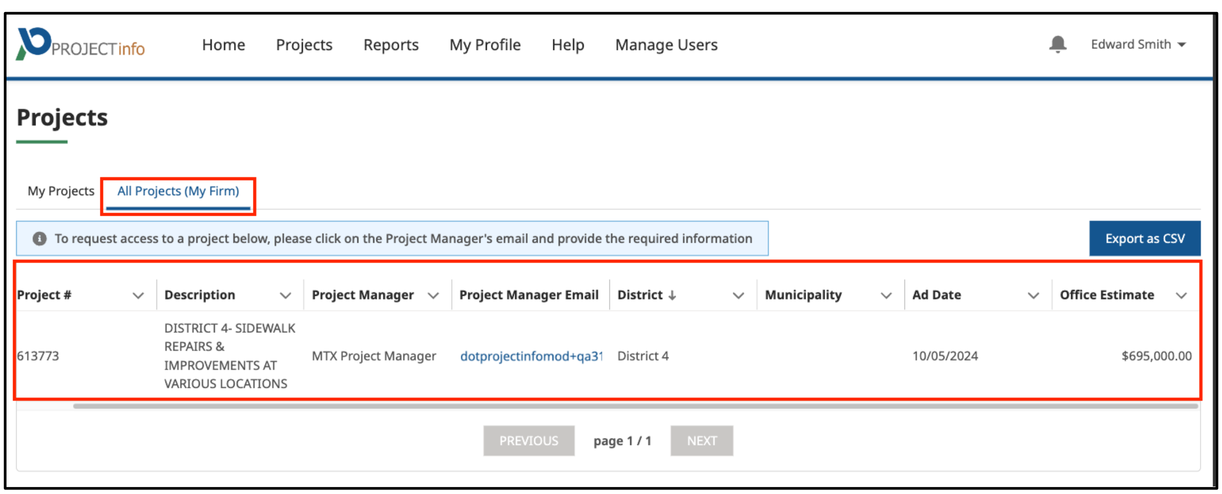
The **Projects** tab in the MassDOT Project Information Portal provides a centralized view of all projects associated with the Design Firm. This tab is divided into two sections:

- **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.

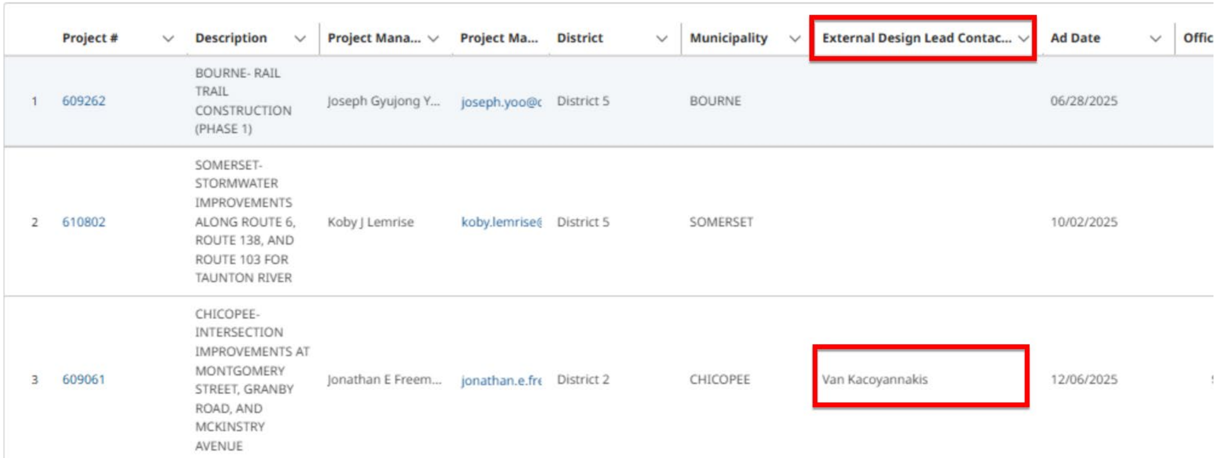
The **Projects** tab also enables users to track project statuses, manage tasks, and collaborate effectively within the portal.

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.**



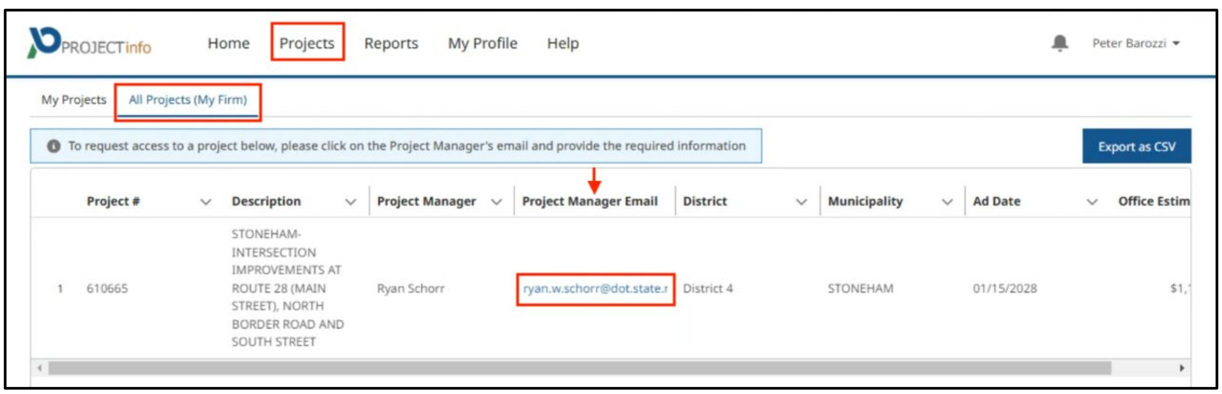
The Design Firm Admin Users can also view the External Design Lead Contact(s) that are assigned on the Projects under their Design Firm.



4.4.2 External Design Lead Contact Requesting Access to a Project

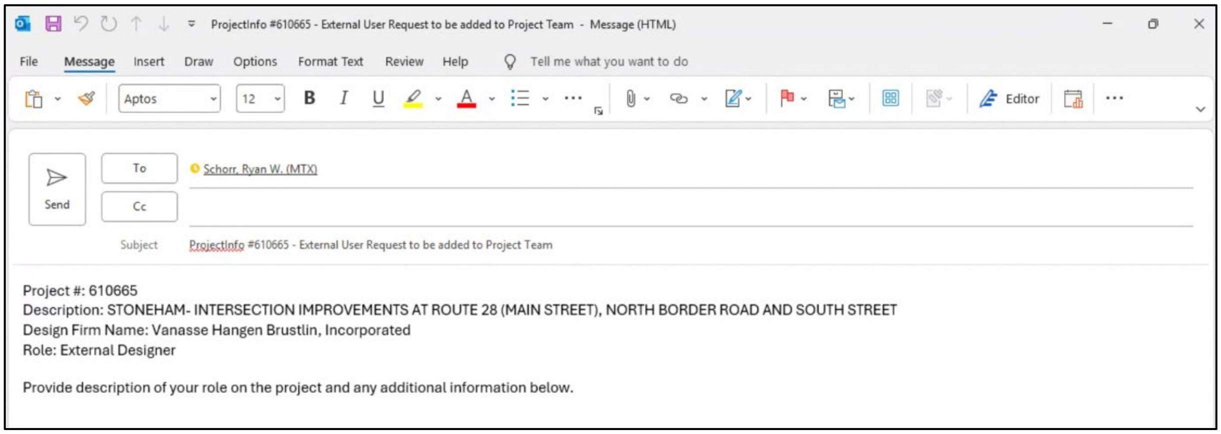
External Design Lead Contact needs to request access to get direct access for a specific project listed under **All Projects (My Firm)**:

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



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

directly if Outlook or pop-ups are blocked.



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

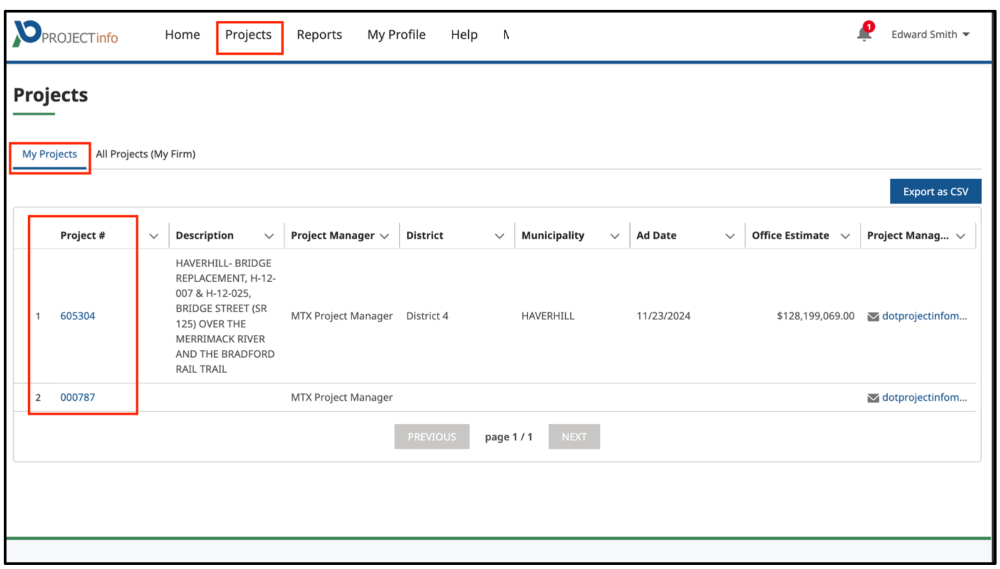
4.4.3 My Projects

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

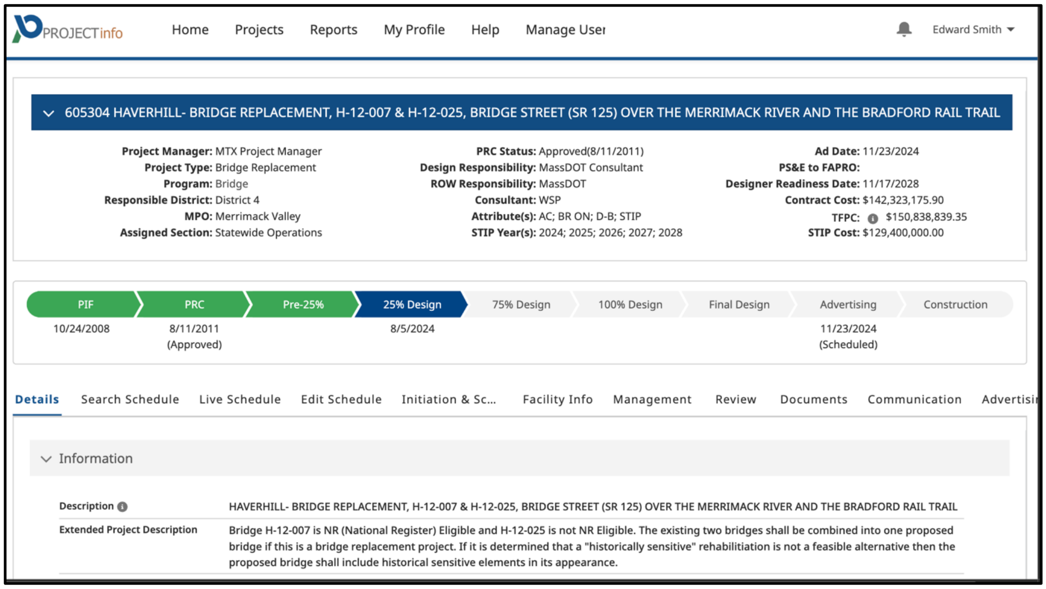
To go to **My Projects** page, follow the steps below:

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 user is directed to the selected Project.



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

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

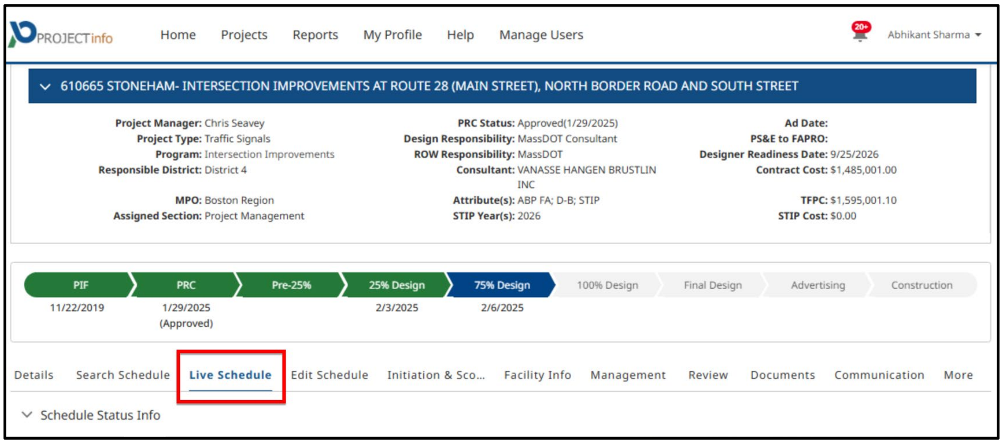
After assignment, the External Design Lead Contact can select a Design Schedule template to incorporate into the existing Initiation-PRC schedule on the **Live Schedule**.

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

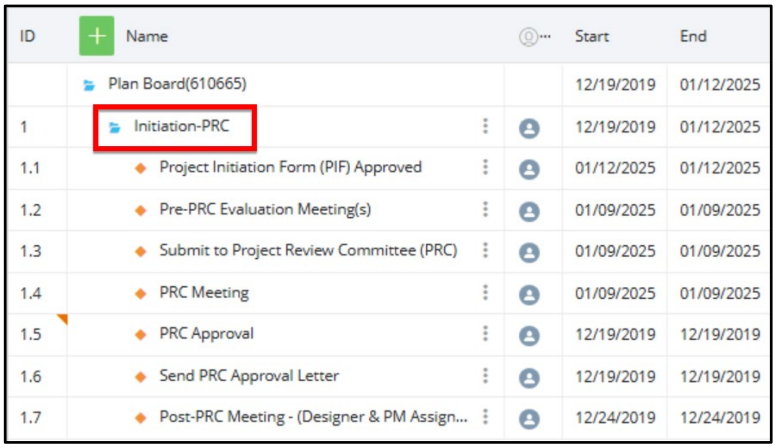
1. Go to the **Project.**
2. Go to the **Search Schedule.**
3. Click on **Export as CSV** to export the Live Schedule Activities. This will document the date(s) of completed or in-progress activities prior to assignment. Refer to the Export Project Activities as a Report section for more details.
4. 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**.

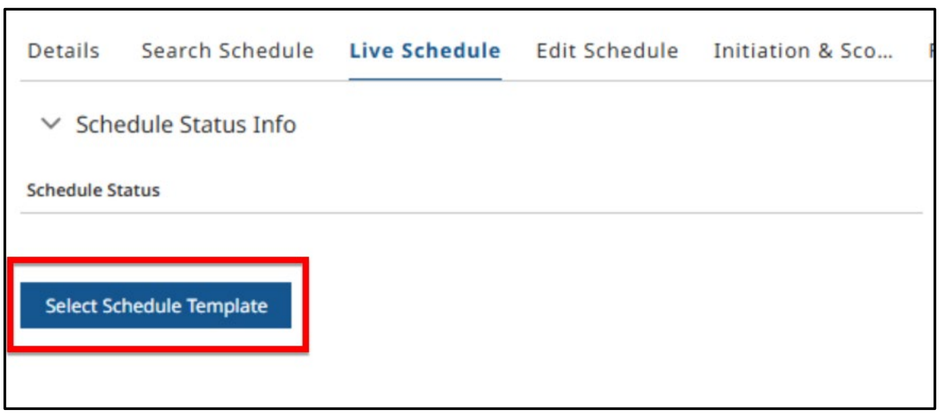


3. By default, Users can see the **Initiation-PRC** Activity Group on the **Live Schedule**.



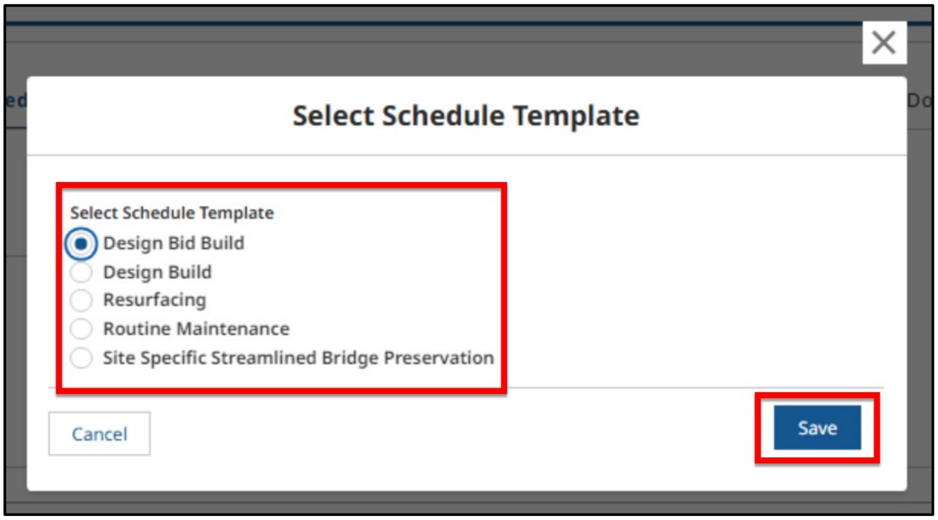
ID	Name	Start	End
	Plan Board(610665)	12/19/2019	01/12/2025
1	Initiation-PRC	12/19/2019	01/12/2025
1.1	Project Initiation Form (PIF) Approved	01/12/2025	01/12/2025
1.2	Pre-PRC Evaluation Meeting(s)	01/09/2025	01/09/2025
1.3	Submit to Project Review Committee (PRC)	01/09/2025	01/09/2025
1.4	PRC Meeting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

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

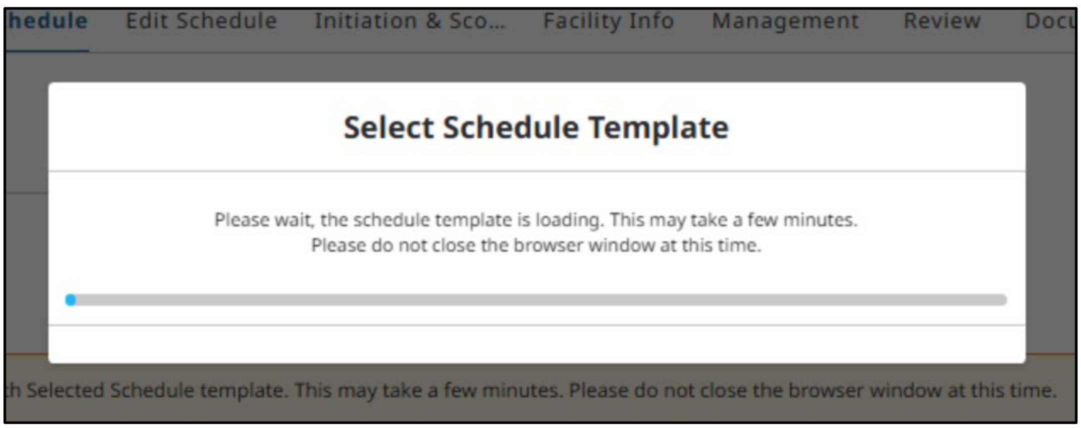


A **Select Schedule Template** pop-up displays.

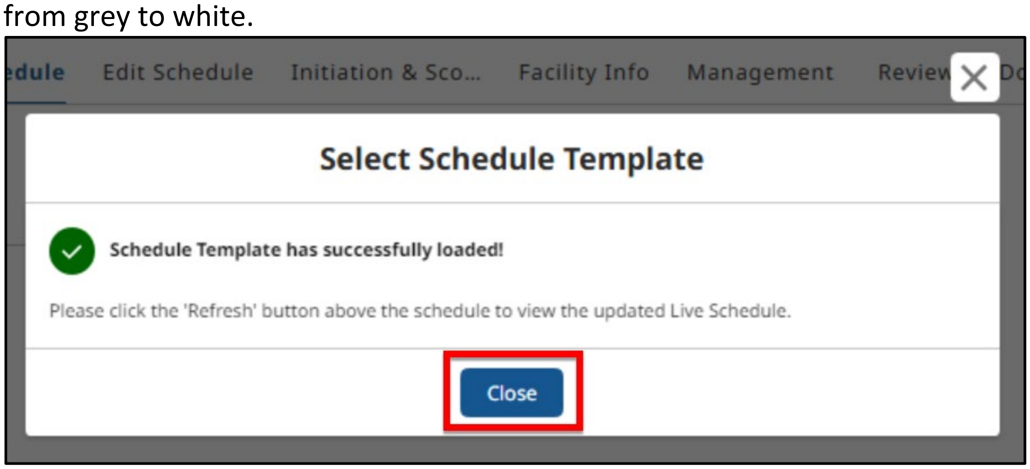
5. Click on the radio button next to the desired Schedule Template and click the **Next** button. **Note**: In this example the Design Bid Build Template is selected. The steps that follow are the same regardless of the Selected Template.



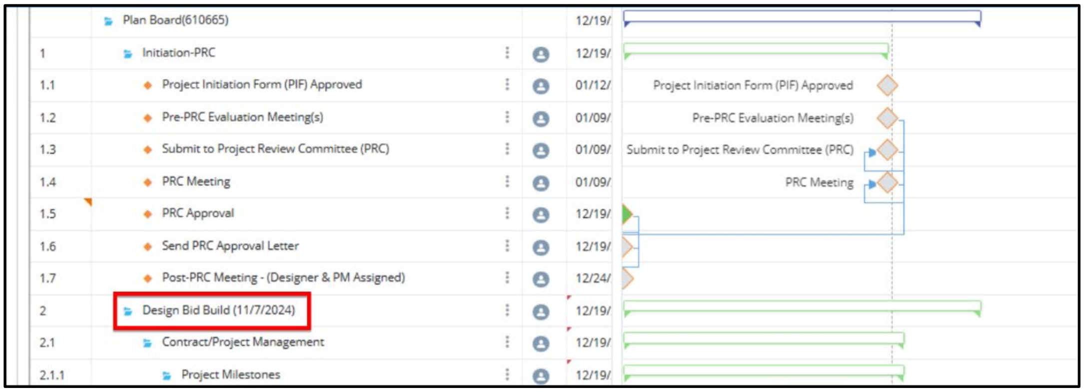
6. A progress bar is displayed while the schedule template is loading.



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**.



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

4.6. Adding Combo Submission

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

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

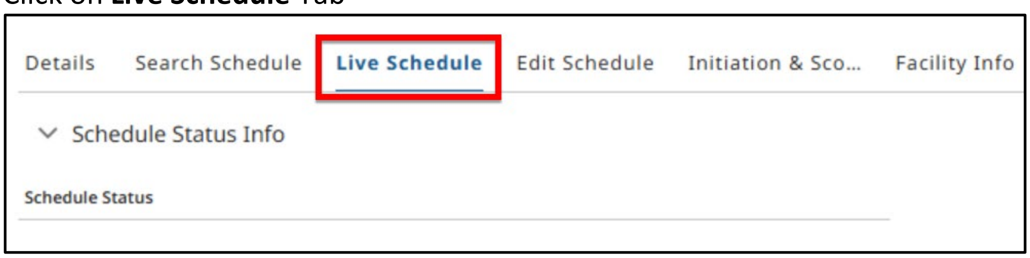
An **Add Combo Submission** is a combined submission of different project stages, such as 25% and 75% design. When a combo submission is completed, the application automatically updates the **Project Stage** to the higher of the two stages.

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

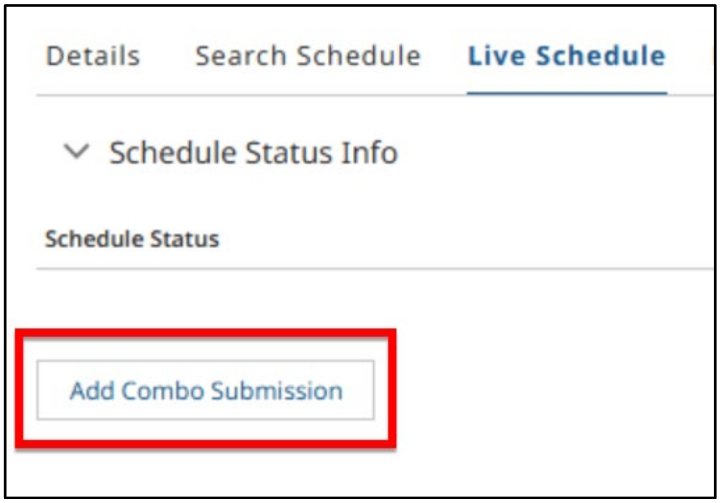
Activity Submission	Project Progress
Prepare and Submit 25%/75% Design Submission	Project will move to 75% stage
Prepare and Submit 75%/100% Design Submission	Project will move to 100% Stage
Prepare and Submit 100%/PS&E Submission	Project will move to Final Stage

To add a **Combo Submission**,

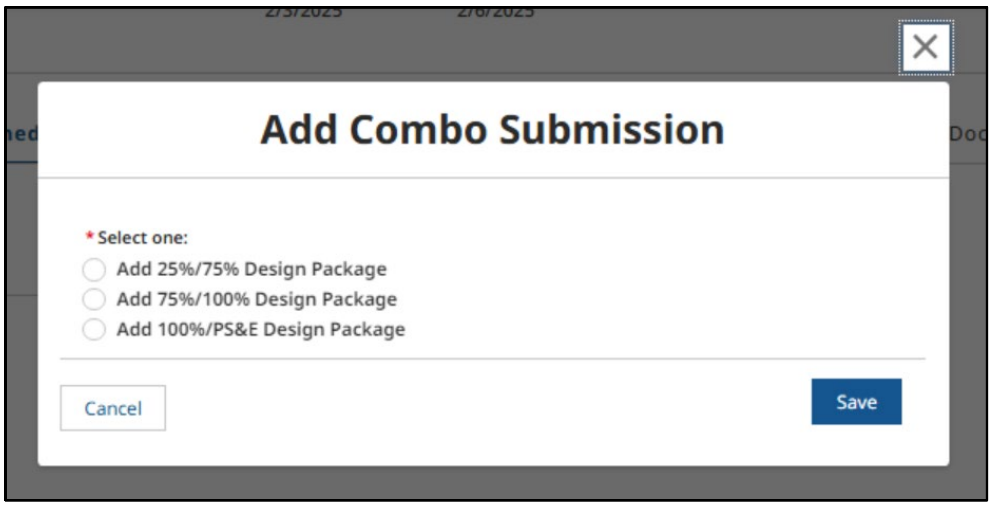
1. Go to the **Project**
2. Click on **Live Schedule** Tab



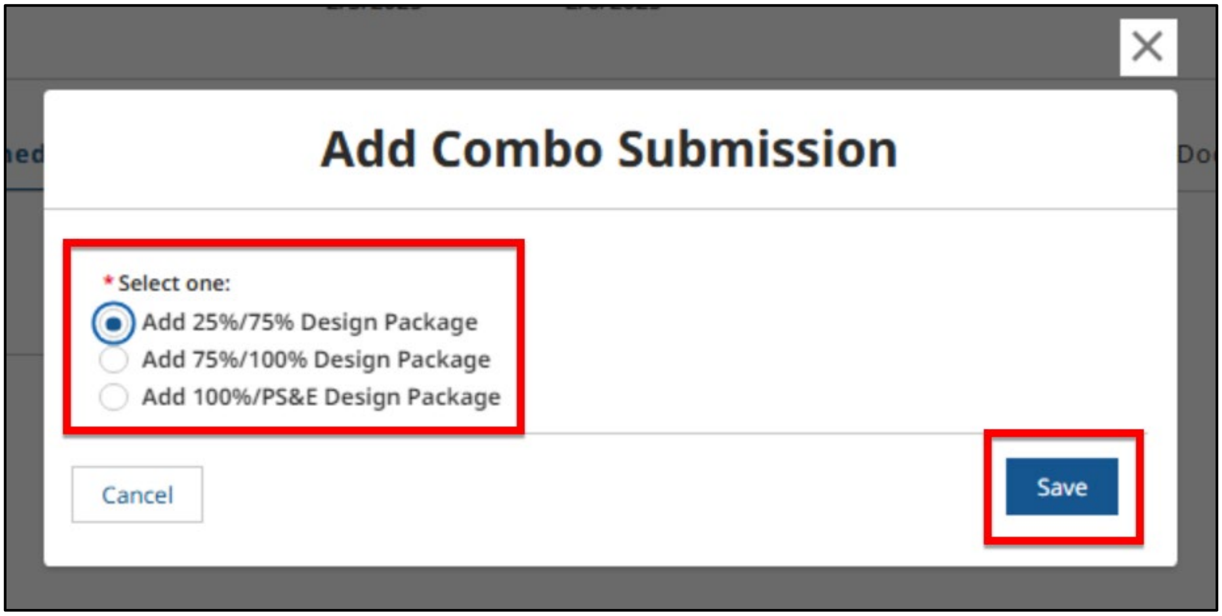
3. Click **Add Combo Submission**



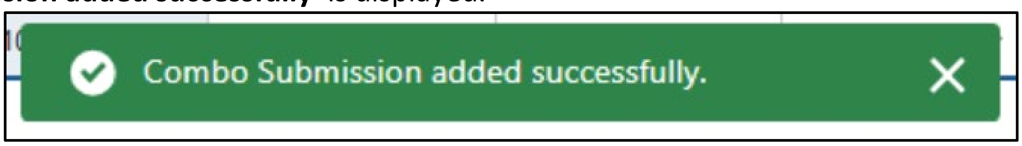
4. Once clicked, it displays the types of Combo Submission that can be added on the **Live Schedule**:



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



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



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

4.7. 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.**

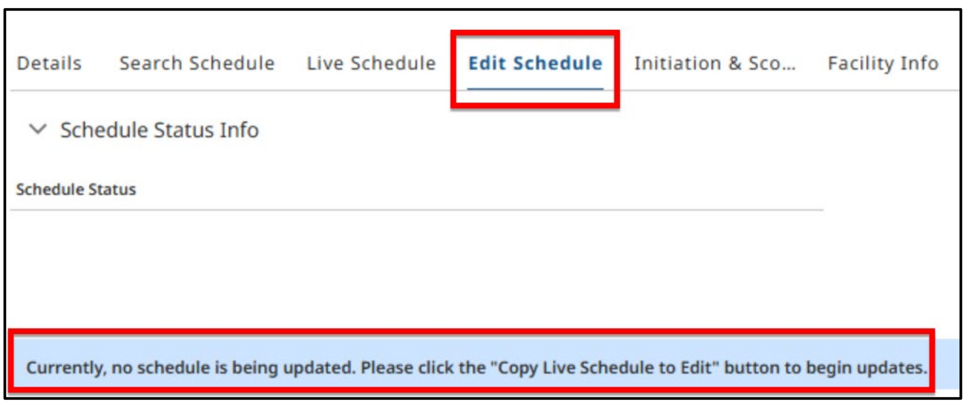
Note - The Live Schedule is Read Only for the External Design Lead Contact(s). And thus, for proposing the Baseline Schedule Updates, the External Design Lead Contact(s) need to utilize the **Edit Schedule**. The Project Manager can make updates directly on the **Live Schedule** when needed.

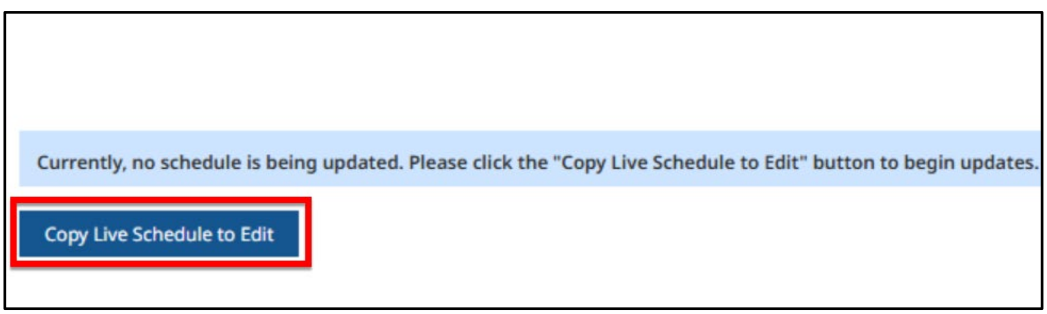
To create an original Baseline Schedule, the External Design Lead Contact must first make a copy of the **Live Schedule** and propose any necessary changes under the **Edit Schedule** tab. Prior to copying the **Live Schedule** for editing, any required additions of the combo submission should be made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

4.7.1 Copying a Live Schedule

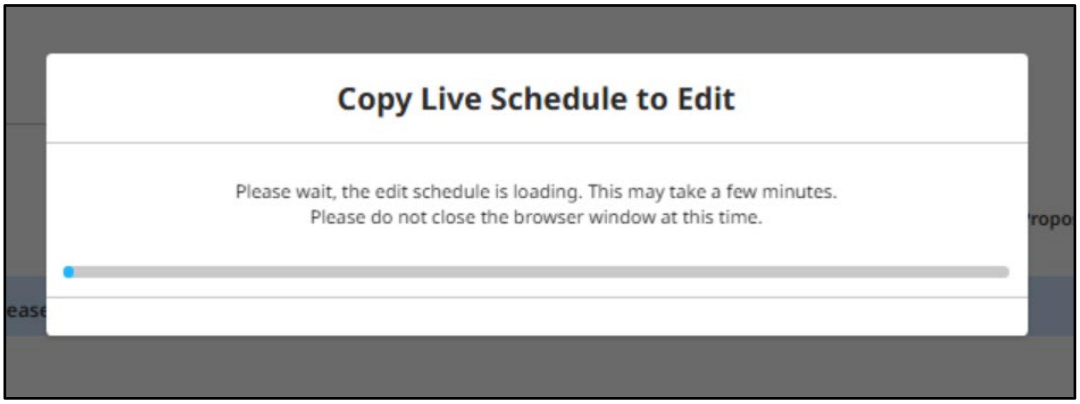
Note: Add the Combo Submission on the Live Schedule first, if required. Refer to the Add Combo Submission section for detailed instructions.

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

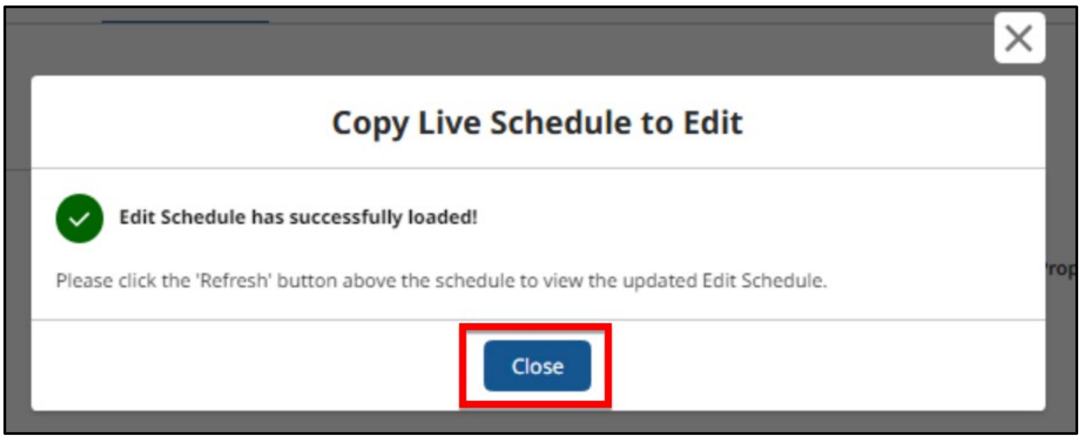
1. Go to the **Project**
2. Go to the Edit **Schedule**.
   Note: If no schedule is currently being updated, an alert will be displayed on the page.
   

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

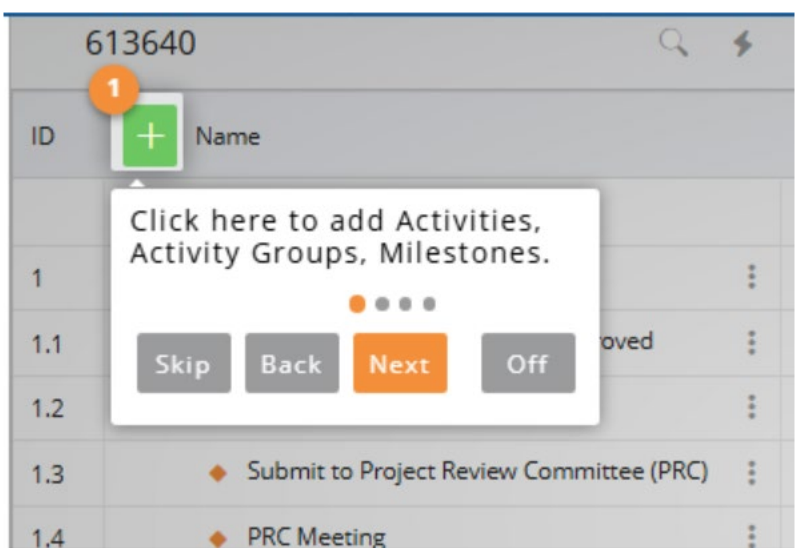
4. A progress bar is displayed while the Copy of the Live Schedule under the Edit Schedule is being generated.



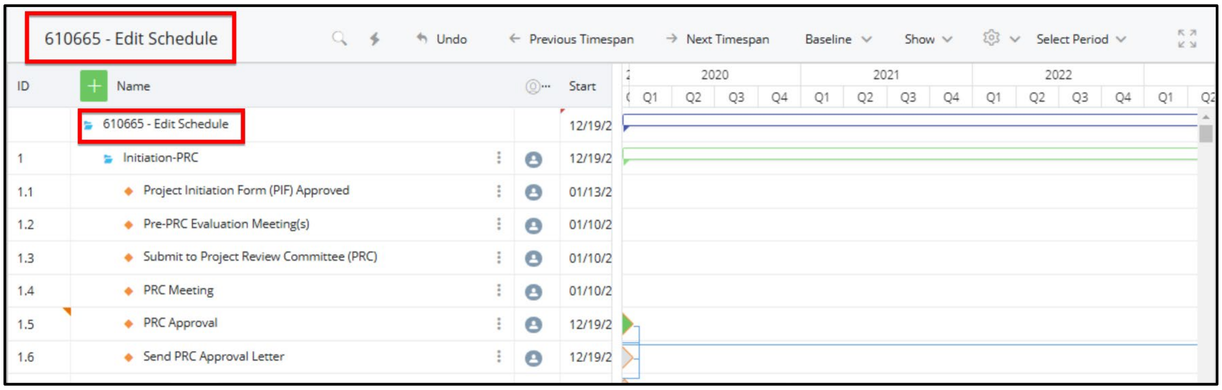
5. A success screen is displayed once the progress bar is complete. Close this screen and wait for the schedule loading to be completed.



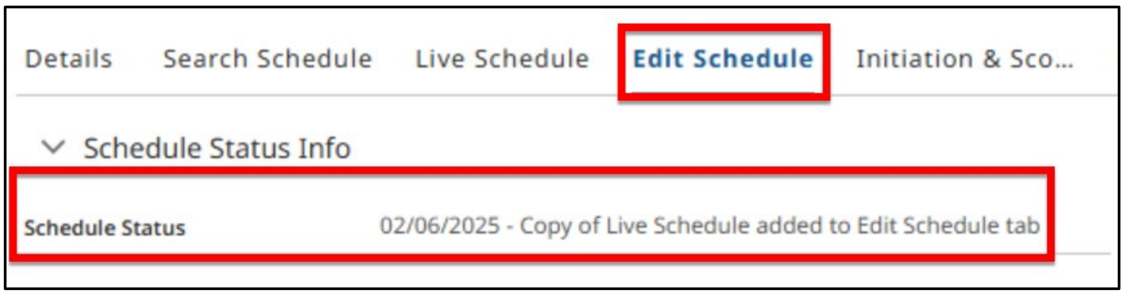
You would also see the following popup. Click Turn Off or Skip to close it.



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



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



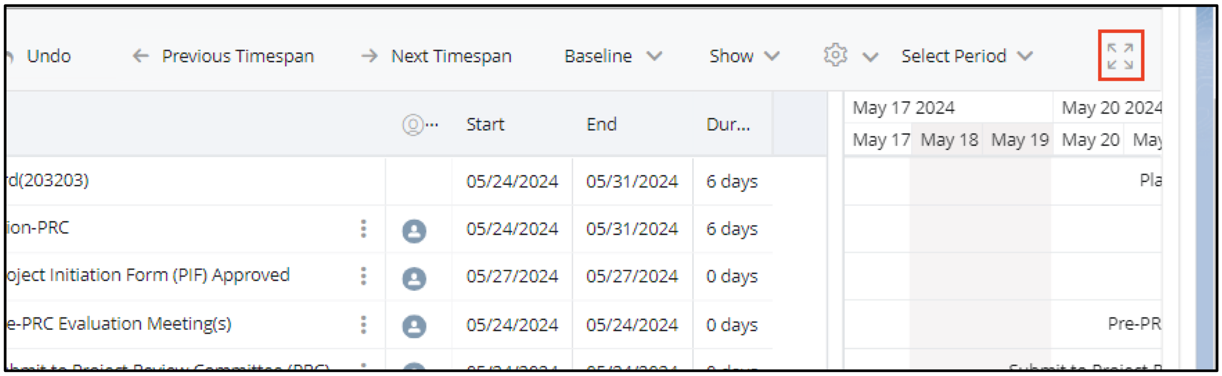
4.7.2 Viewing and Customizing the Edit Schedule

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

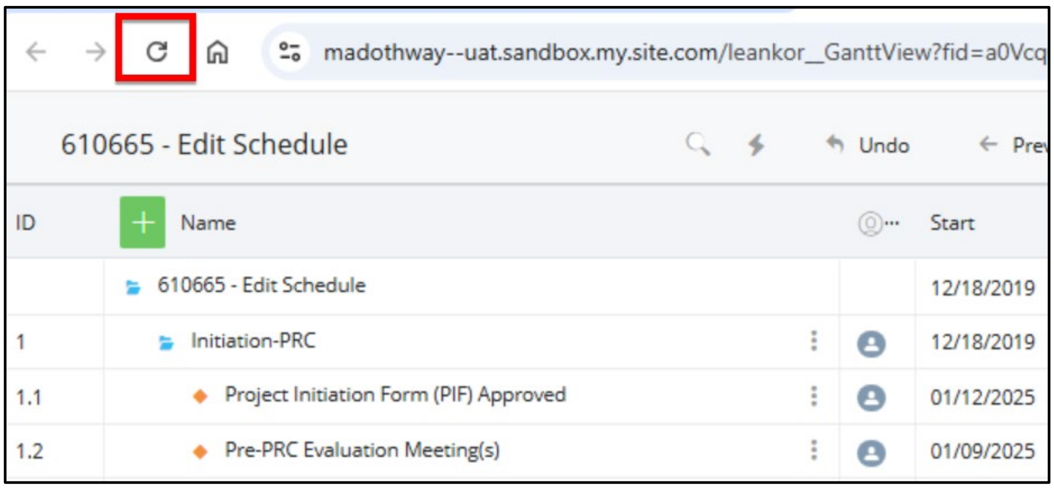
The frequently used customizable features are described below:
Refresh button:
The **Refresh** button updates the schedule to display the most recent changes. It is used after editing activities in the schedule template to ensure the latest modifications are visible.

Expanded View:

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

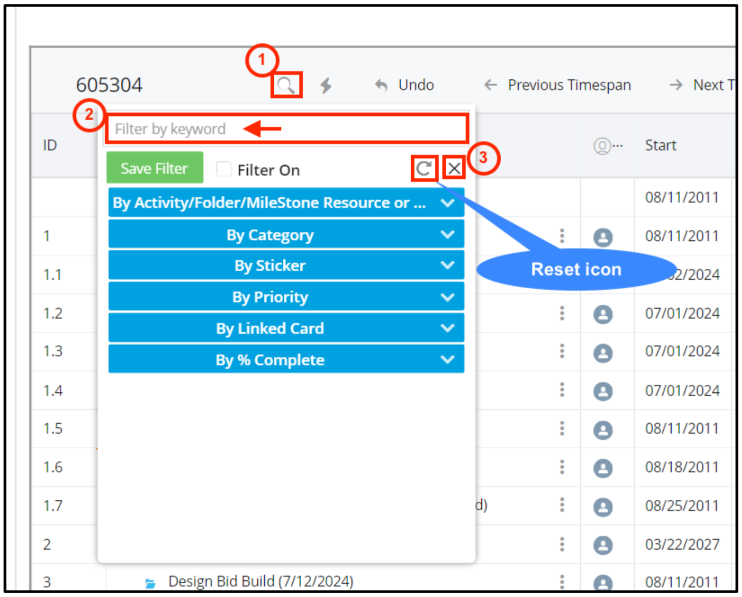


Note: In Expanded View, the **Reload this page** icon is at the top-left corner. Hovering over the icon will also indicate this. Click it to refresh the screen.



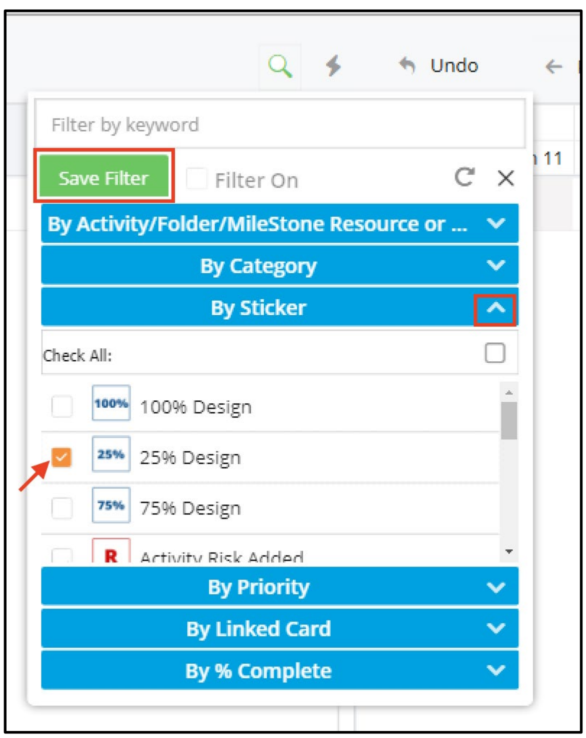
Filter Activities/Milestones by Key Words:
Users can filter and search for desired Activities or Milestones using keywords.

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.

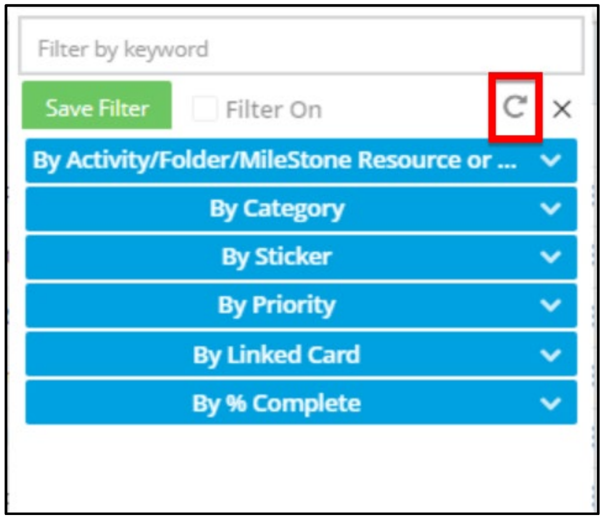


Note:

- 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:

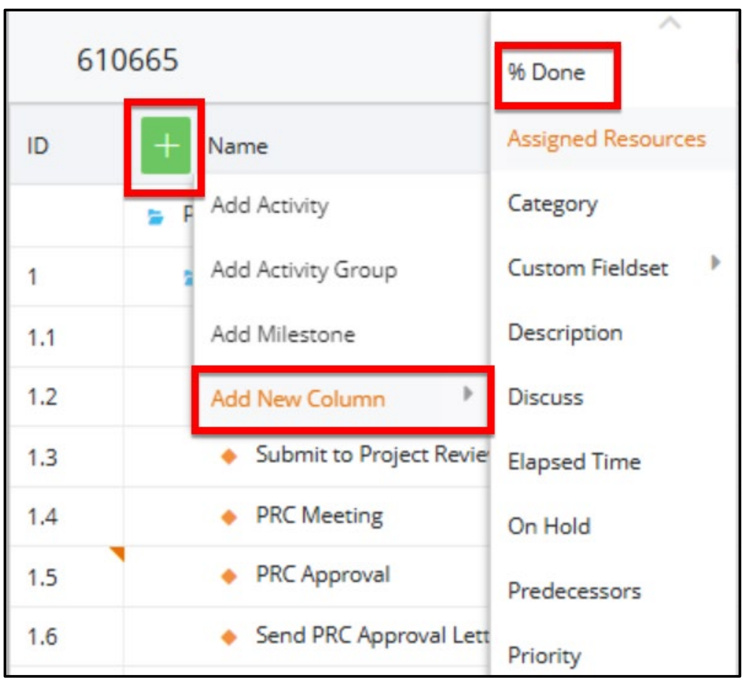


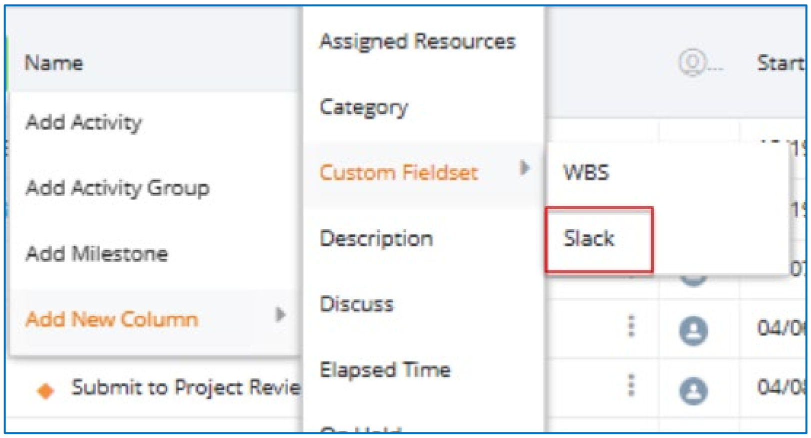
- Users can also reset the filters after use, by clicking on the **Reset** Icon



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.

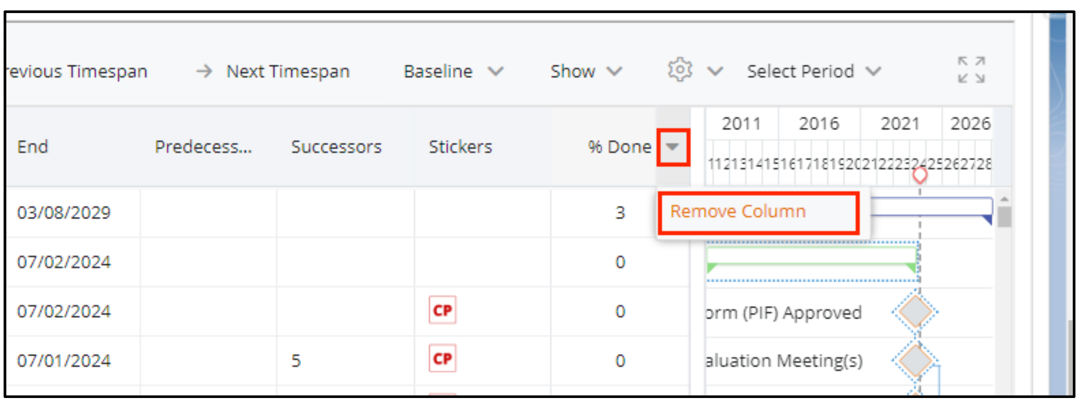




3. The selected column will be displayed on the Schedule.

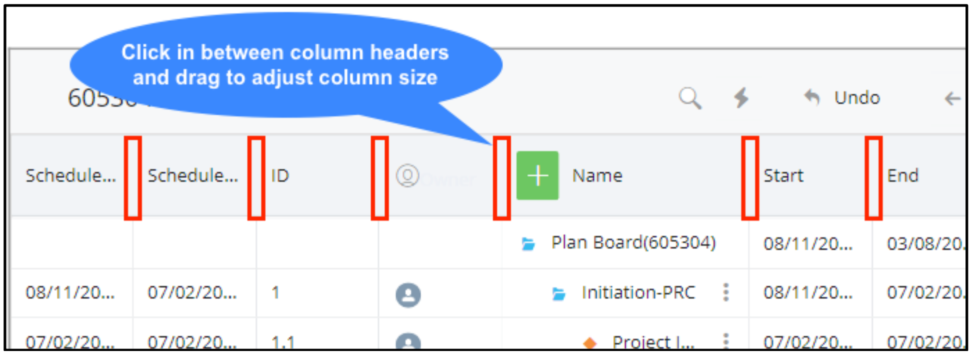
Removing Columns:

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.

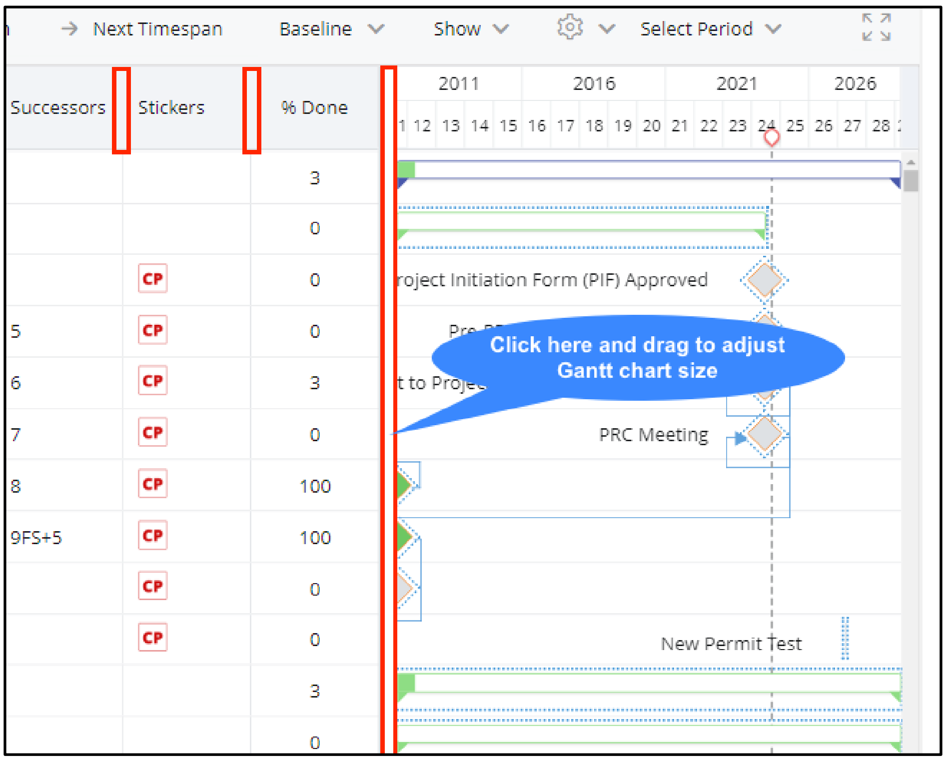


Adjusting column/Gantt chart size:

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

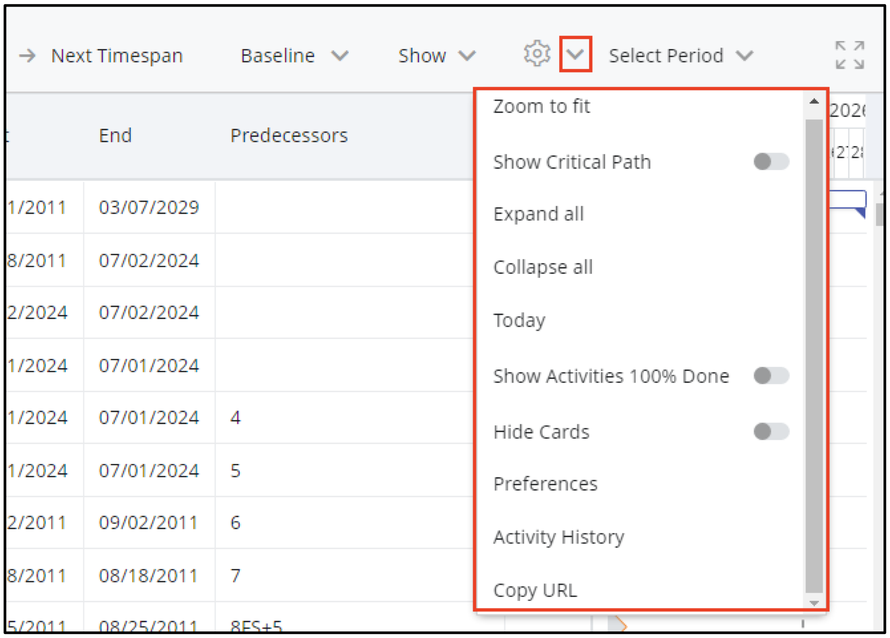


2. Similarly, click on the Gantt chart separation line and drag (Left/Right) to adjust the Gantt column size.



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.

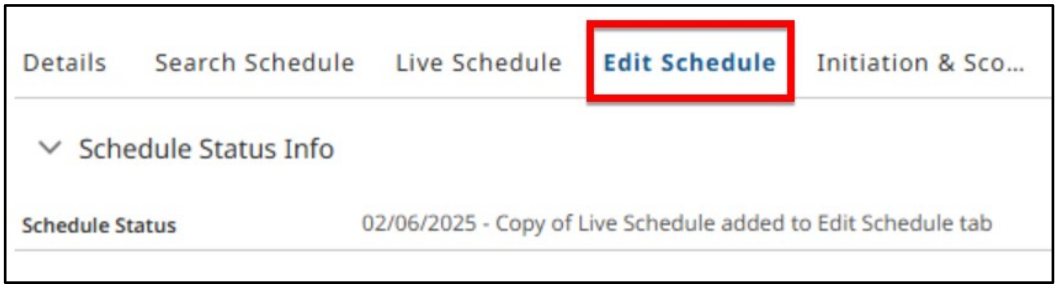
4.7.3.1. Updating Completed Activities

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

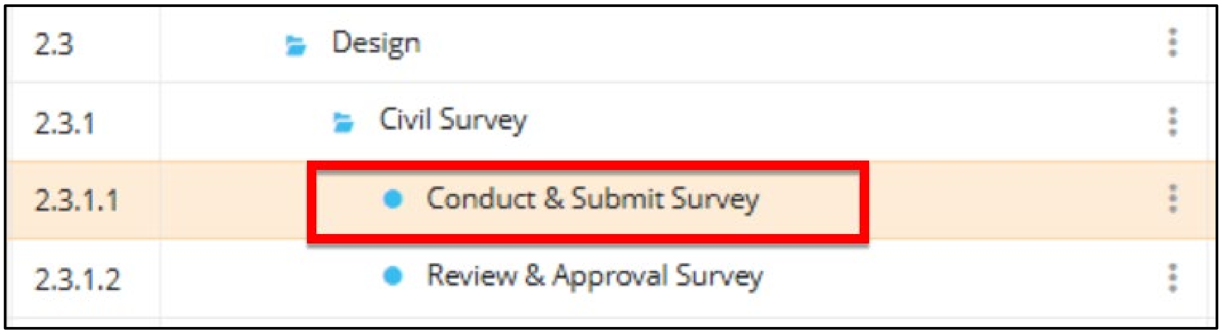
For all Activities that were completed prior to the ProjectInfo Baseline Submission, the **Completion Date(s)** must be corrected on the **Edit Schedule**. Additionally, these activities must be marked as '**Manually Scheduled**'. The External Design Lead Contact may refer to the most recent **Microsoft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

To update **Completed Activities**:

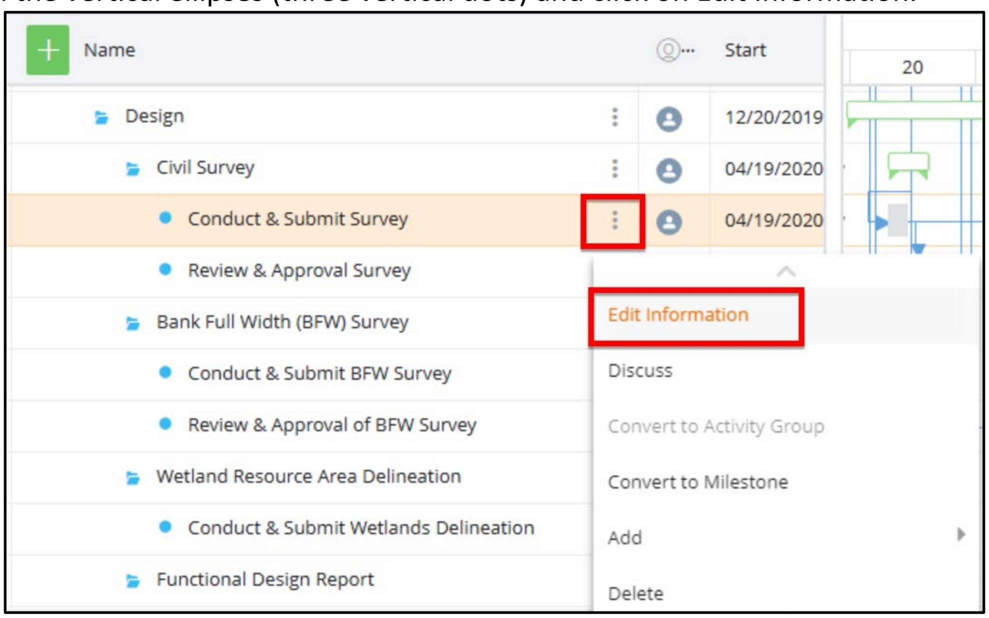
1. Go to the **Project**.
2. Go to **Edit Schedule**



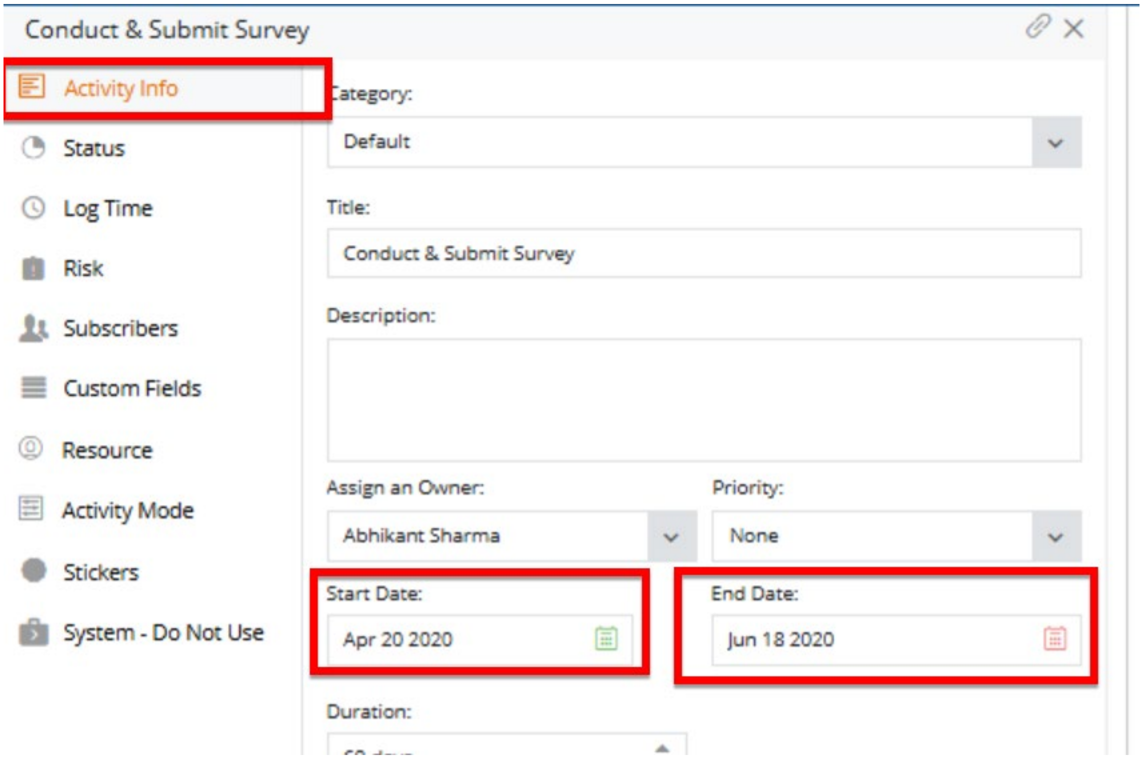
3. Scroll down to the **Edit Schedule** and locate the Activity which is completed before the ProjectInfo Baseline Submission. **Note**: In this example the Activity **Conduct & Submit Survey** is used. The steps that follow are the same regardless of the Activity.



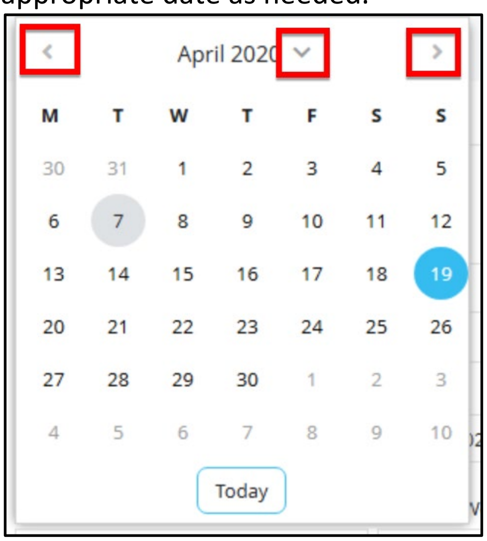
4. Click on the vertical ellipses (three vertical dots) and click on Edit Information.



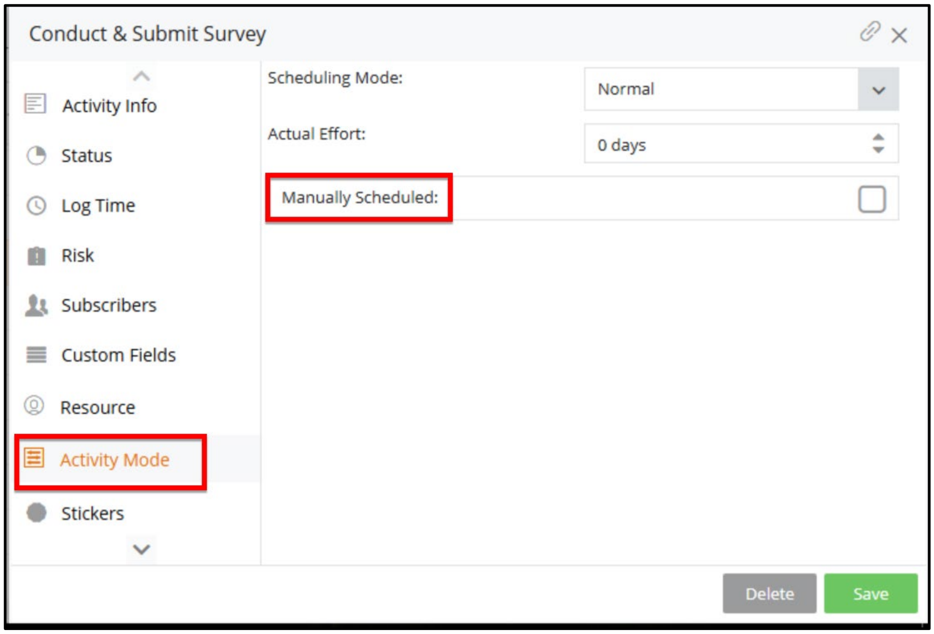
5. Under **Activity Info** Tab, locate the **Start Date** and **Due Date** fields.



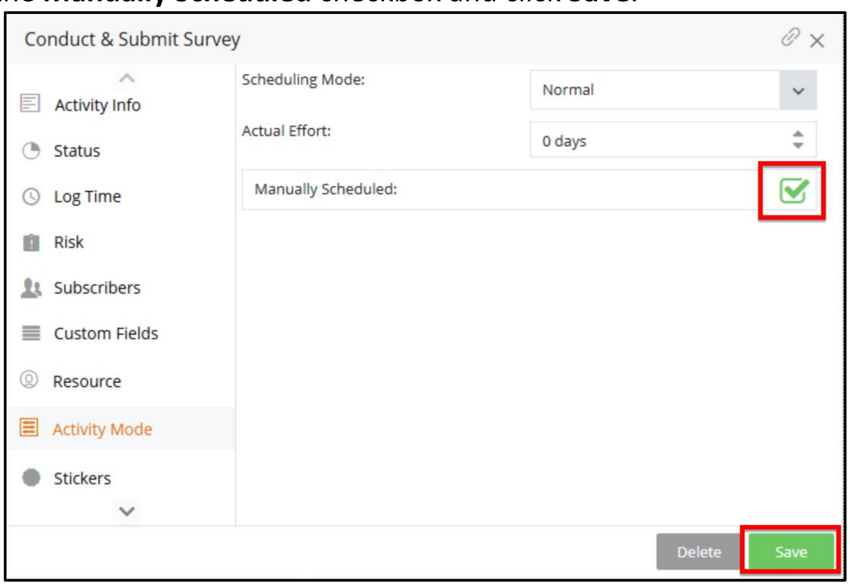
6. Click on the Calendar icon for the **Start Date** and adjust it accordingly to ensure that the **Due Date** reflects the correct **Completion Date** for the Activity. Use the downward arrow to modify the **Year**, the side arrows to navigate between **Months,** and select the appropriate date as needed.



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



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



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.

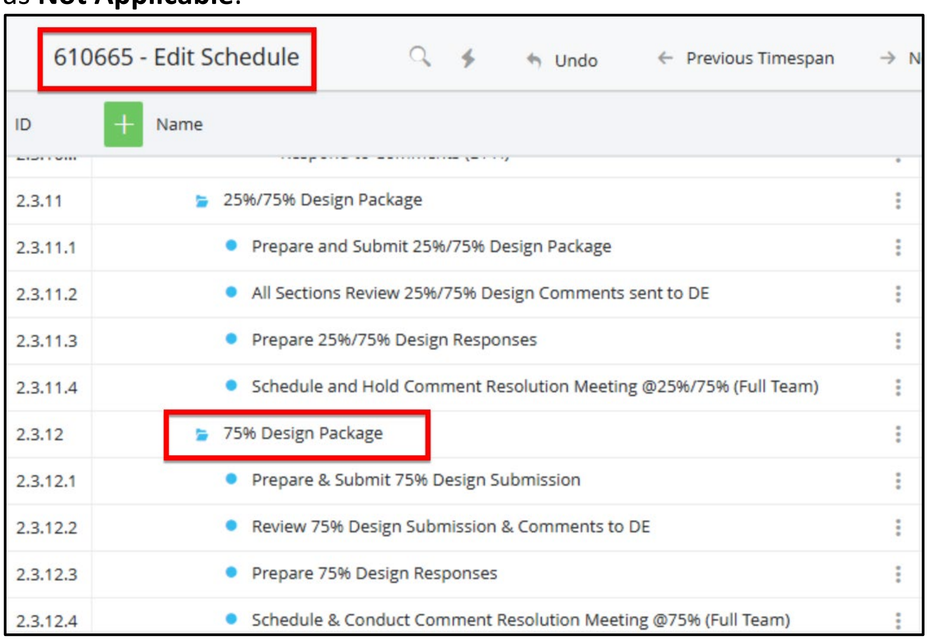
Prerequisite: Since marking an Activity as **Not Applicable (N/A)** removes its **Predecessors/Successors** users must ensure the following within the Project Schedule:

- 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**)

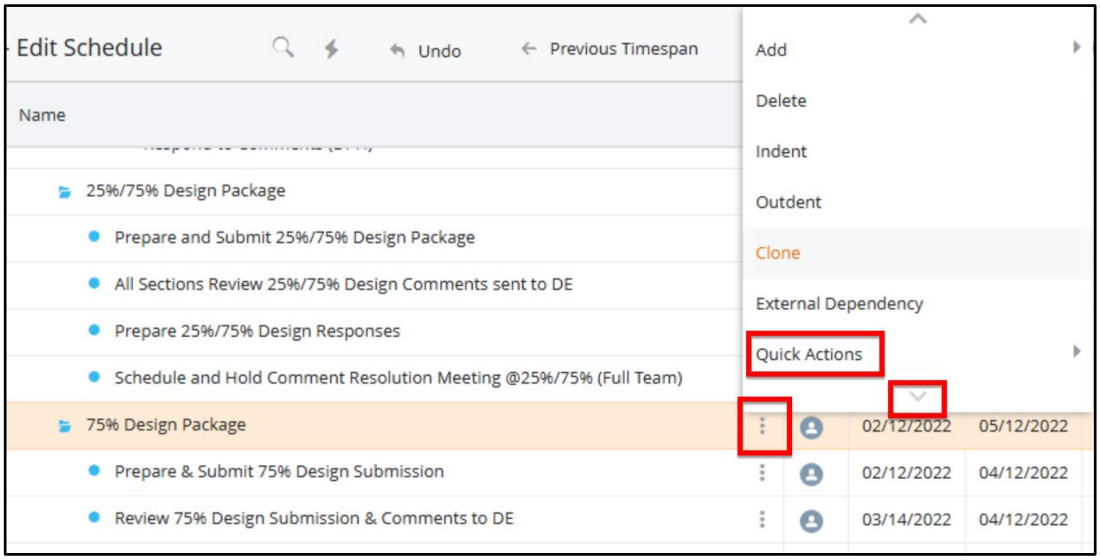
For detailed steps on updating dependencies, refer to the Editing Dependencies section.

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

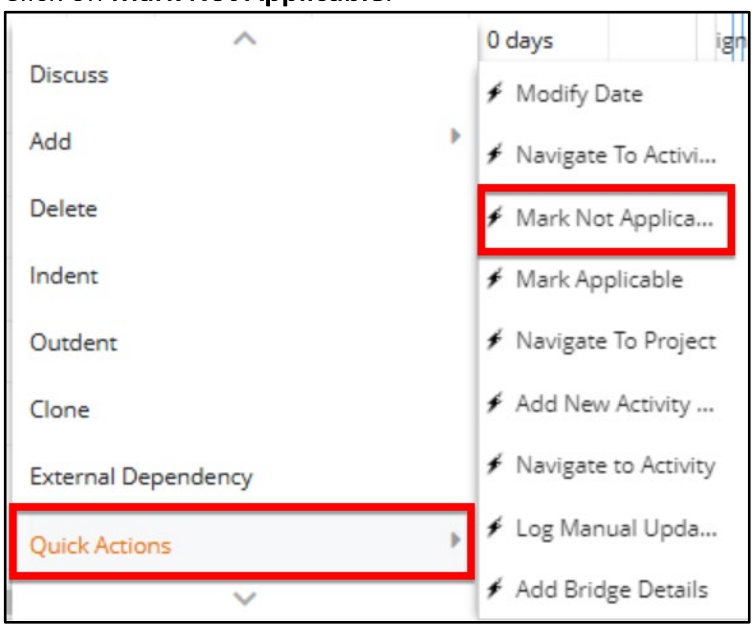
1. Go to the **Project**
2. Go to **Edit Schedule**
3. Under the **Edit Schedule**, locate the Activity Group/Activity that needs to be marked as **Not Applicable**.



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



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



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

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

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

Parent Activity Group →

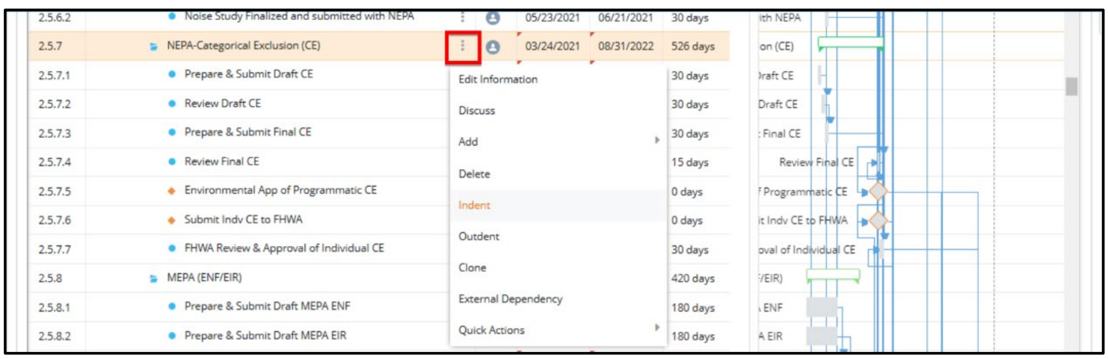
Activity Group →

Activity →

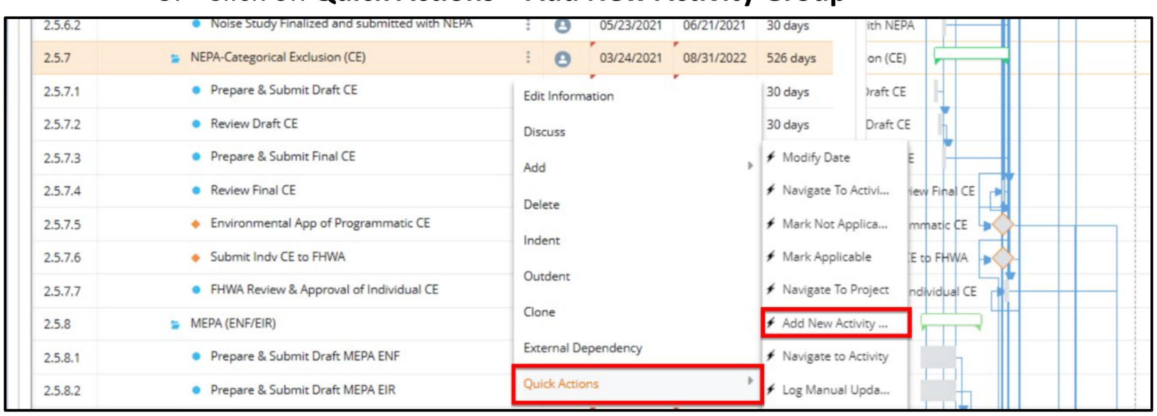
4.7.3.3. Adding Activity Groups

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

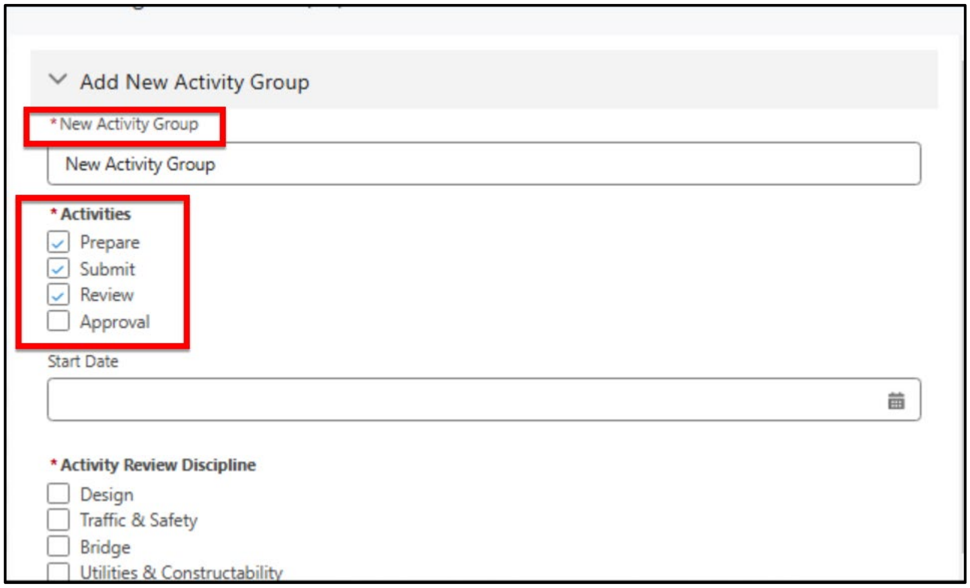
1. Identify the existing **Activity Group** under which the new group will be added.
2. Click the vertical ellipses (three vertical dots)



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

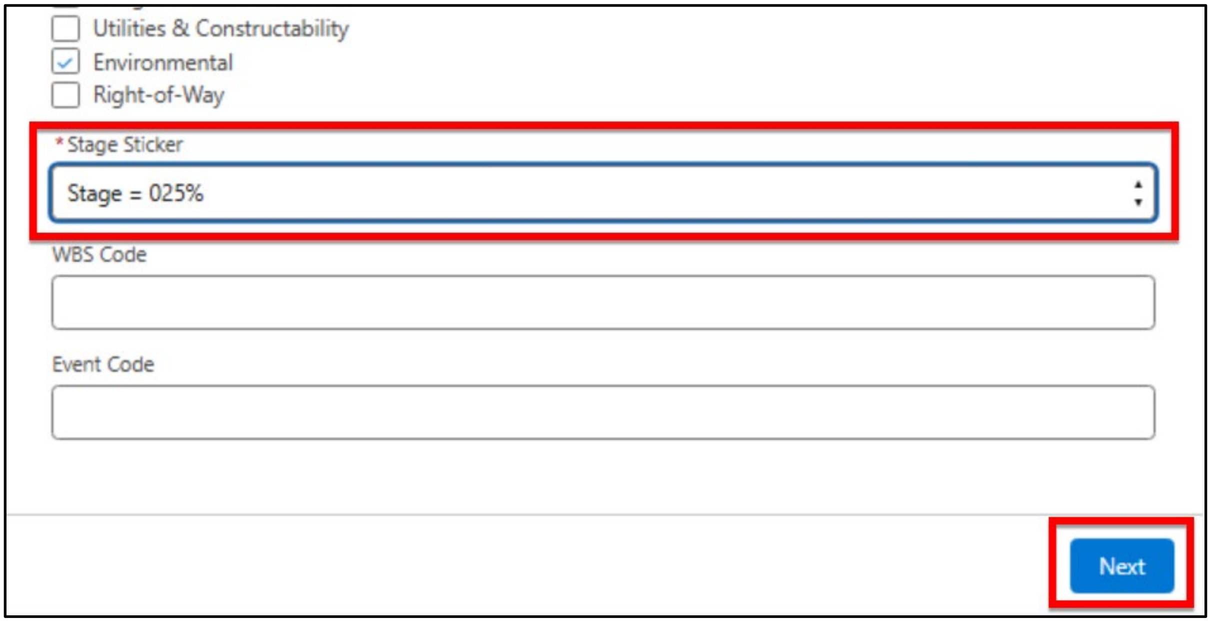


4. Enter a **New Activity Group** name and select **Activities** needed under the new Activity Group



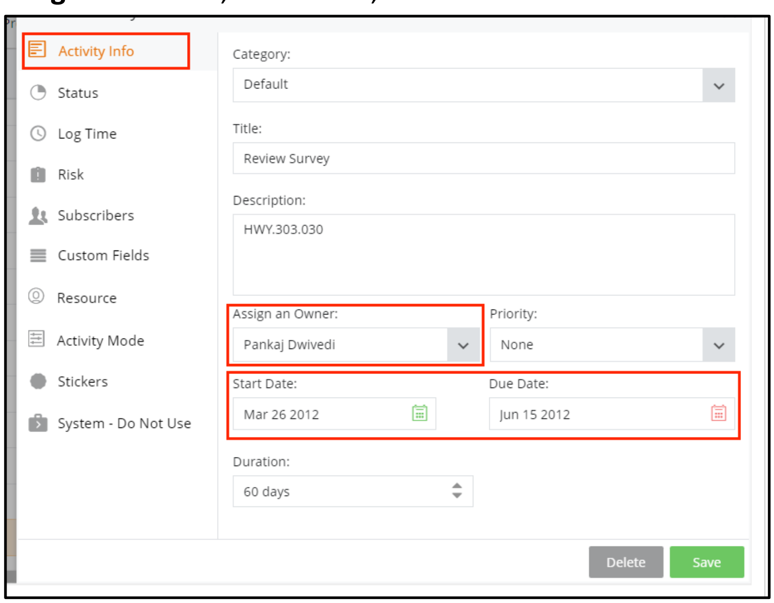
5. Select the **Activity Review Discipline** based on the section for which the new **Activity Group** is being added. For example, if adding a **New Environmental Permit**, the appropriate **Activity Review Discipline** to select would be **Environmental**.

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



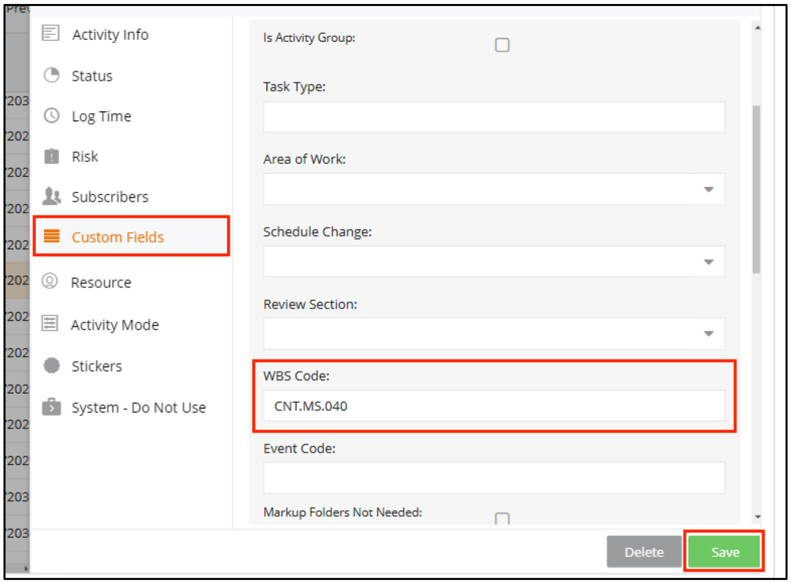
7. Once loading is complete, the new **Activity Group** will appear in the **Edit Schedule**.

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 Da**te fields.



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**.



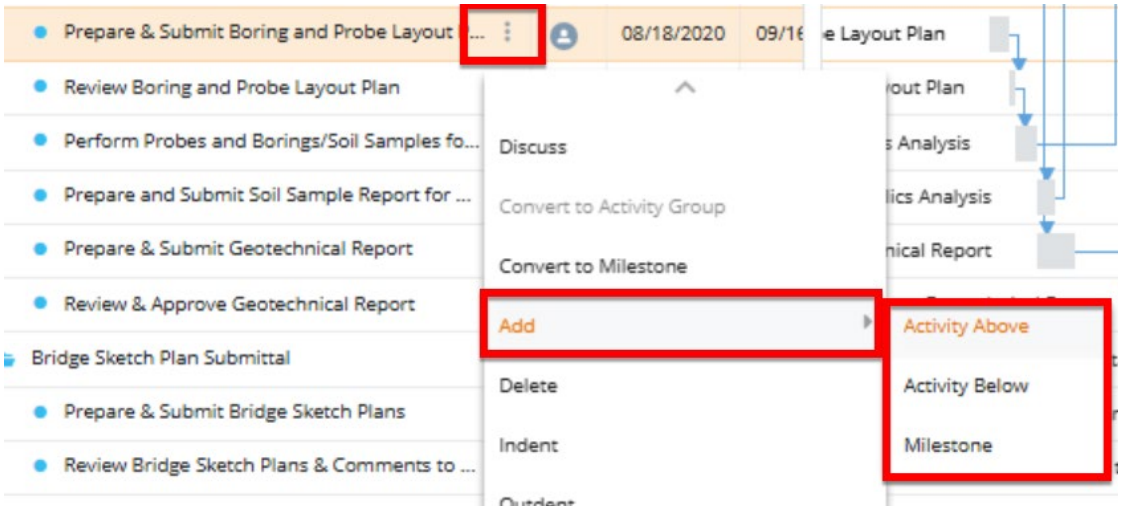
Note: The **WBS Structure** is intentionally developed to align with the **Area of Work** and the **Division/Subdivision of Work** as defined in the Scoping Workbook. **Do not modify the WBS Structure** under any circumstances. For questions regarding WBS codes for new Activity Groups, contact Project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

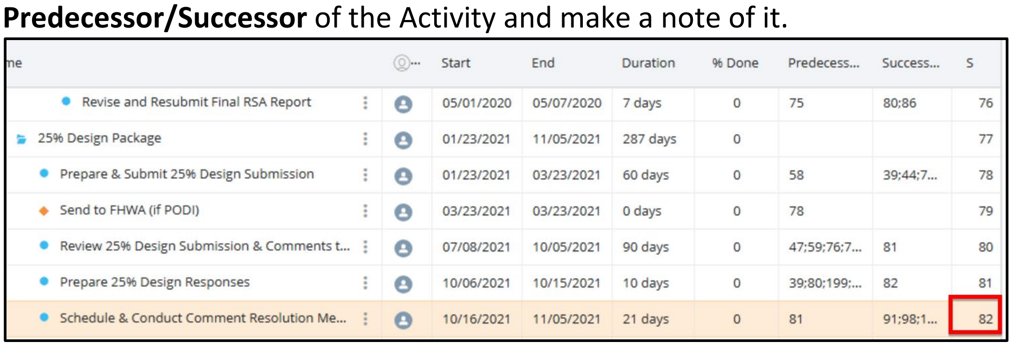
12. The newly added **Activity** will be shown on the Schedule. Double-click the Activity to rename it.
13. **NOTE**: If an Activity is added by mistake, the External Design Lead Contact will not be able to Delete Activities from the Edit Schedule. Change its name to "Error" and the Project Manager should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

4.7.3.5 Editing Dependencies

Prerequisite: Columns for **Predecessor**s, **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.



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

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

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

4. Enter the identified sequence value and click anywhere on the schedule to save the changes.
   Note: If multiple **Predecessor** or **Successor** values are required, separate the sequence values with a semicolon (;) as shown below:

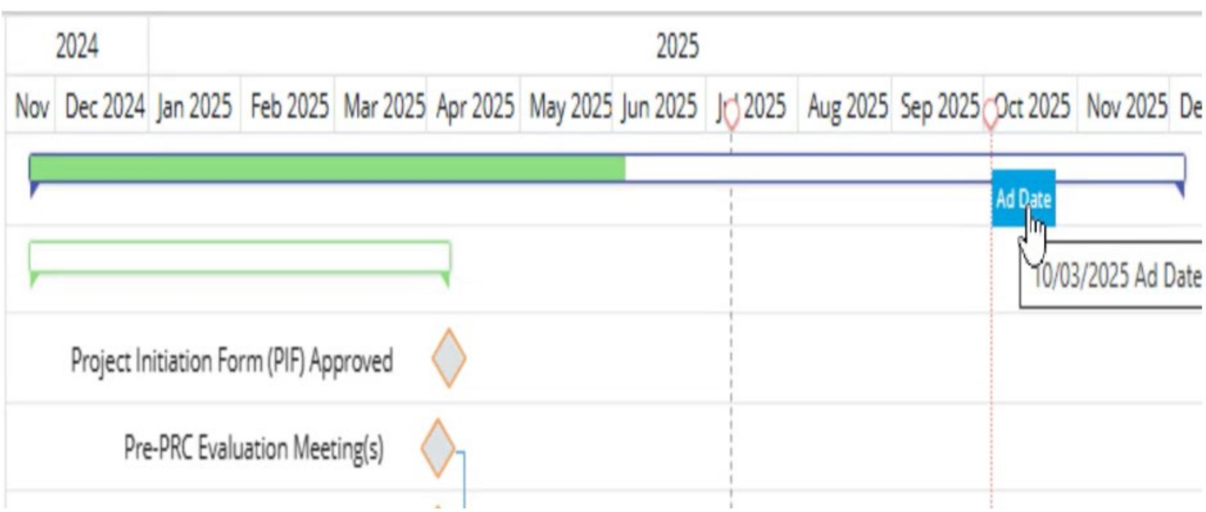
Subsurface Utility Exploration		08/17/2020	10/15/2020	60 days	0	31	80;91;86

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

4.7.3.6 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.

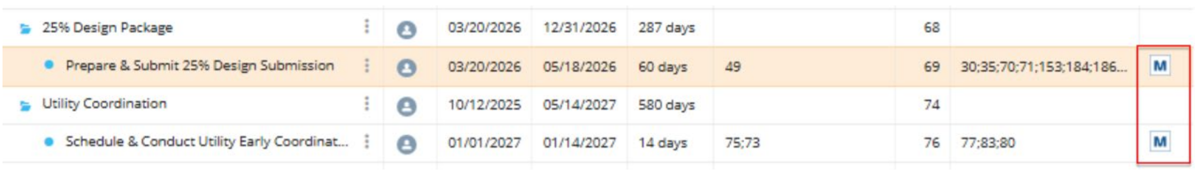
- You can hover over the Ad Date Blue Box as well which would display the Ad Date for the Project as shown below -



4.7.3.7 Reviewing Major Milestones and adjusting Durations as needed

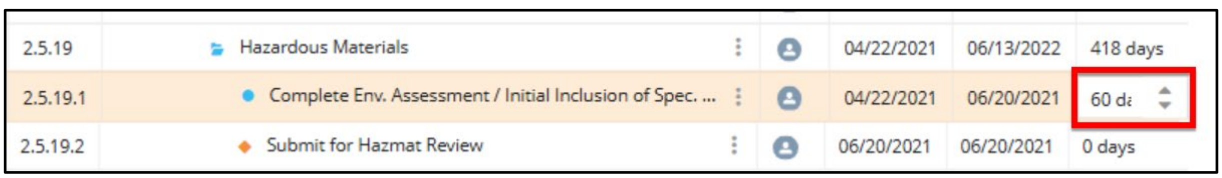
Prerequisite: Column for **Stickers** is added on the Edit Schedule. Refer to Viewing and Customizing the Edit Schedule section for more details on Adding a column.

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.

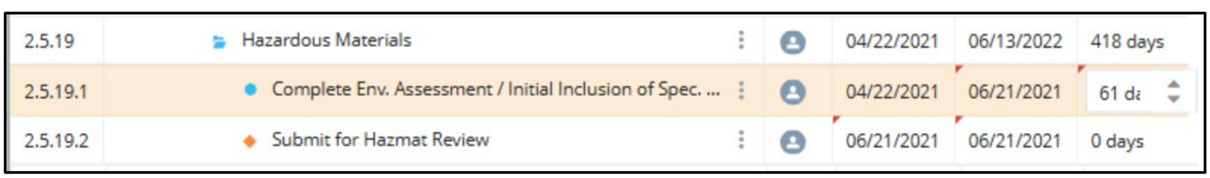


Refer to Viewing and Customizing the Edit Schedule section for more details on Filtering out the Activities **By Sticker** on the Edit Schedule.To update **Activity Durations** follow the steps below:

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. 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.

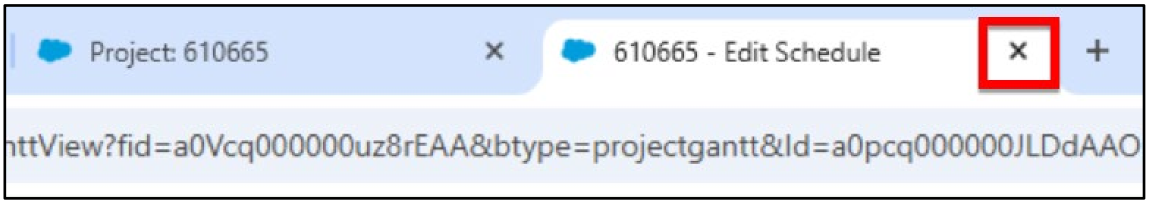


3. Click anywhere on the screen to **Save**.
4. The Activity Duration Changes will be saved and the subsequent Date changes because of this Duration Change will be applied to the successor Activities and Milestones as well.

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.

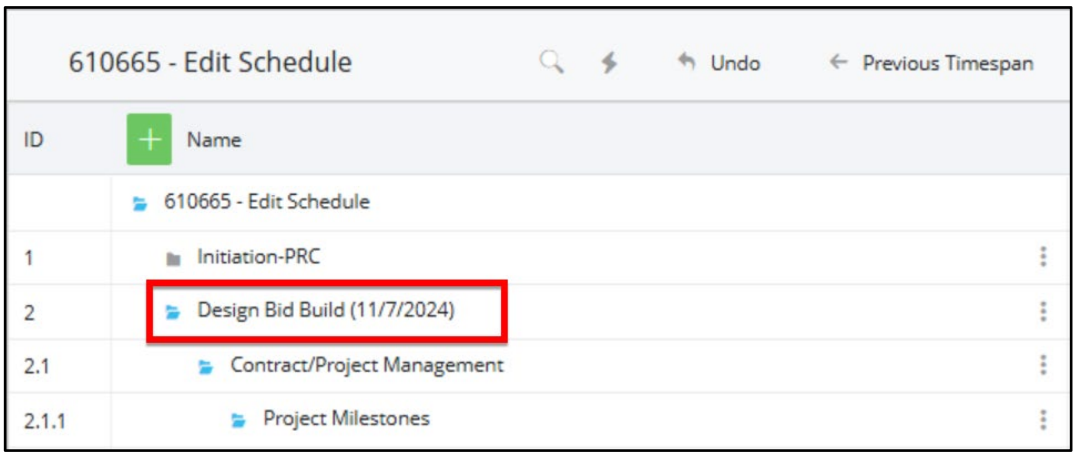


2. Click on the **Refresh** button under the **Edit Schedule** tab.

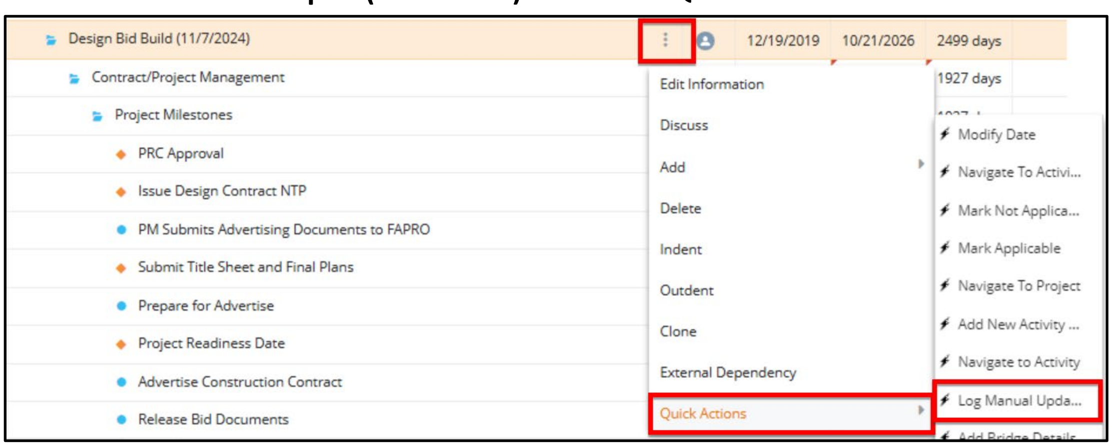
   Refer to [Viewing and Customizing the Edit Schedule]() section for more details on **Refresh**. This step must be performed before **Log Manual Update**, regardless of whether the user was working in the Expanded View.

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**

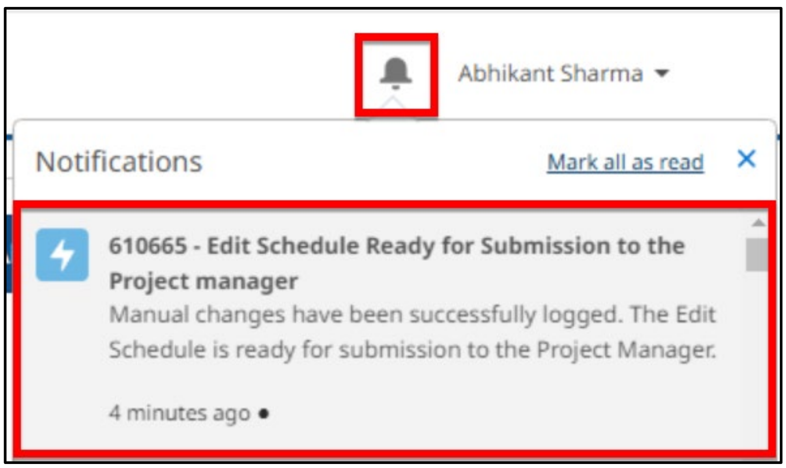


5. Click on the **Log Manual Update** quick action. A blank pop-up will briefly appear and then close automatically, as shown below.

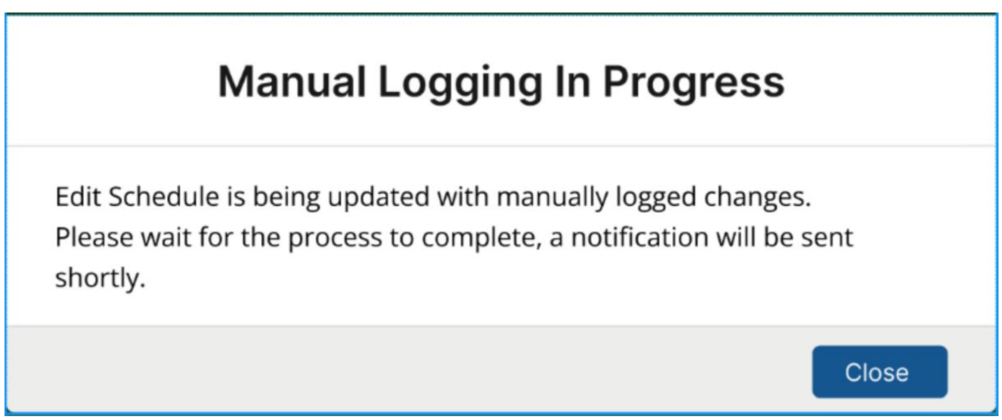
6. Upon completion, wait for the **Log Manual Update** process to finish.

   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**:



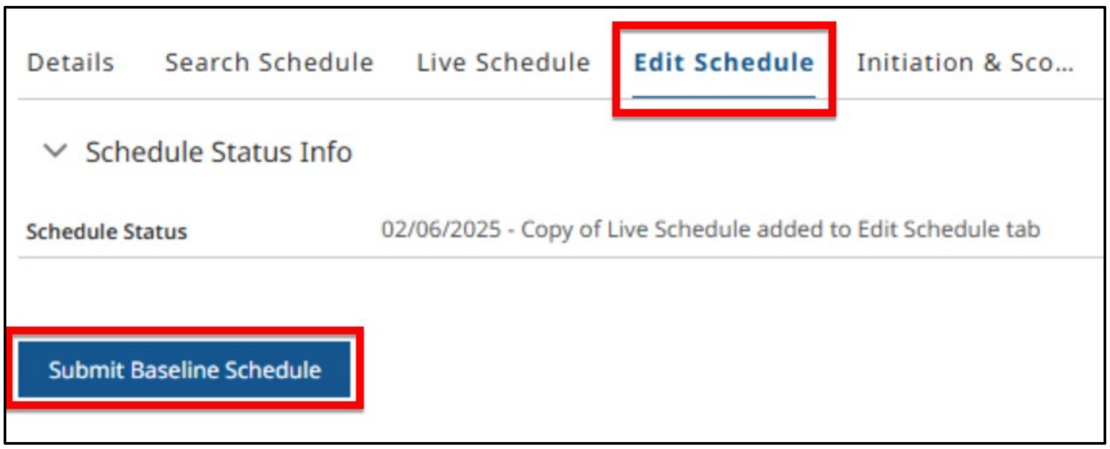
4.7.5 Submitting Baseline Schedule

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.

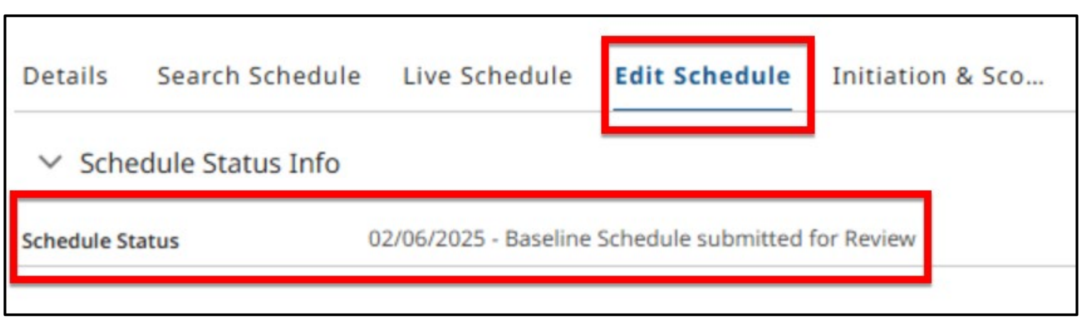
To submit the **Baseline Schedule**:

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.

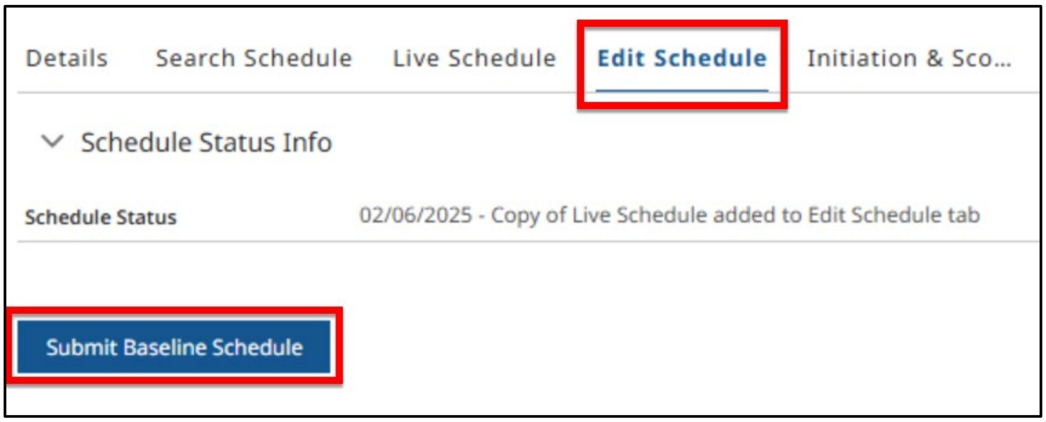


4.7.5.1 Discrepancies Screen in the Edit Schedule

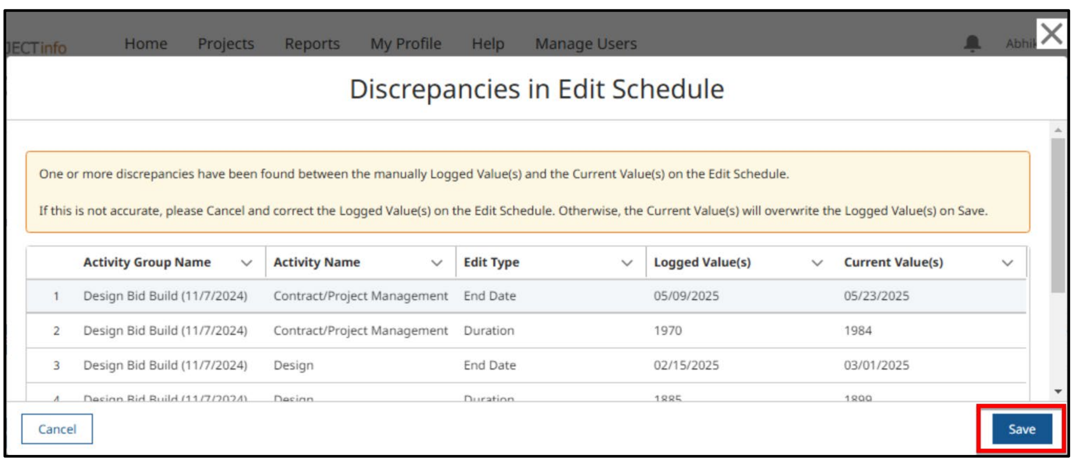
Discrepancies in the Edit Schedule screen may be displayed while Submitting the Baseline Schedule, when there are some additional changes made on the Edit Schedule after the **Log Manual Update** is clicked.

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**.

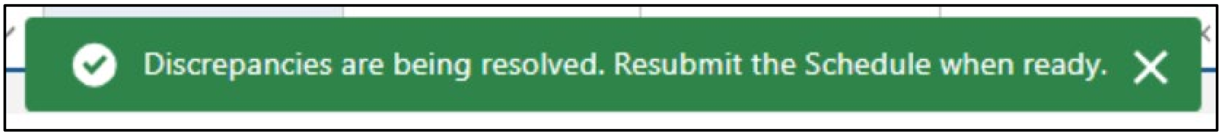


4. Click on **Save**.



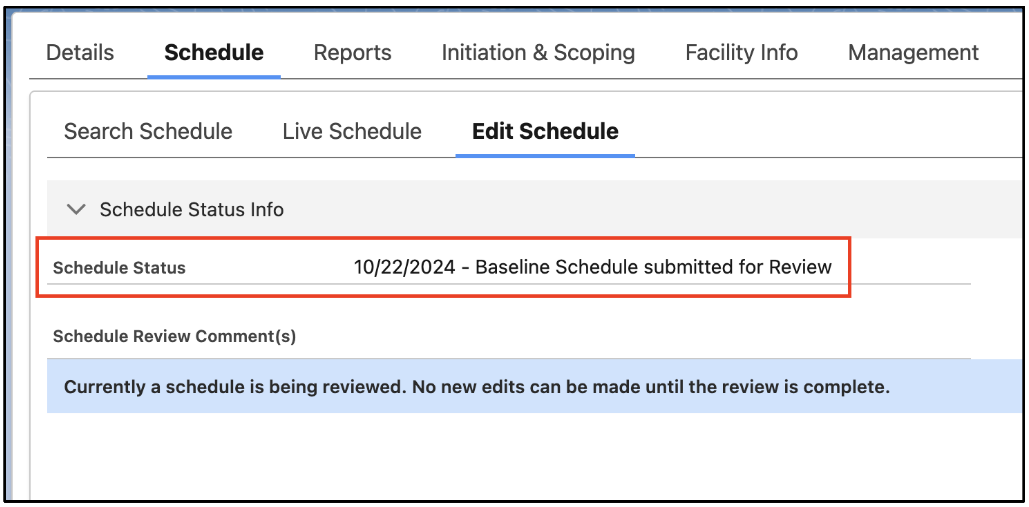
5. A green success message is displayed stating **'Discrepancies are being resolved. Resubmit the Baseline Schedule when ready'**.

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:

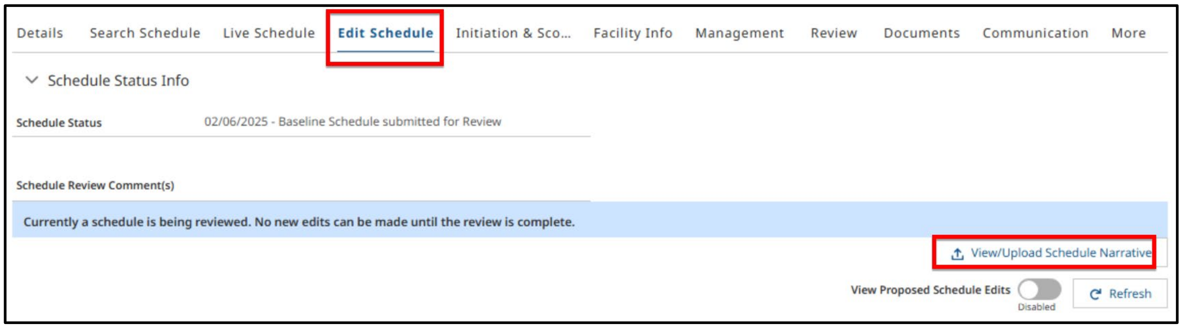
- All the Activities Completed before the ProjectInfo Baseline Submission, that have been Manually Scheduled
- **Status** of each major deliverable
- Issues and proposed solutions
- Significant **Meetings and Events**
- Outstanding issues and critical actions required by the Designer, MassDOT or third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

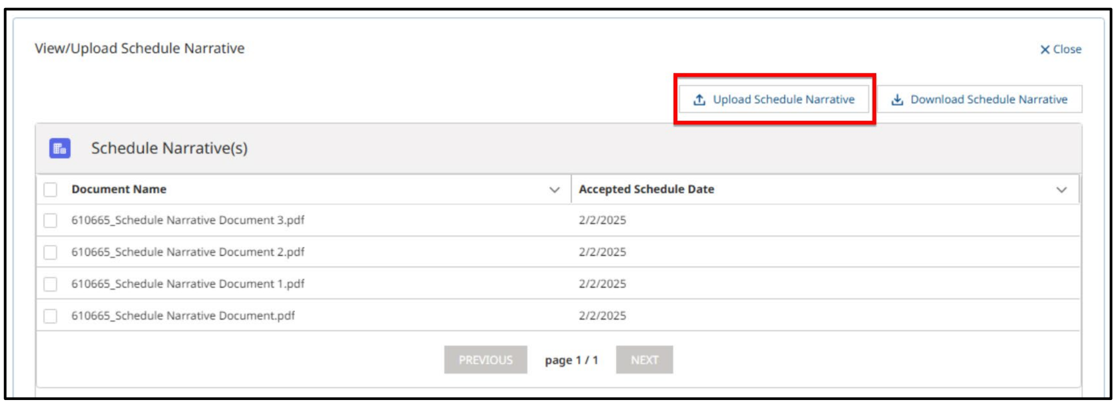
This document ensures that the **Project Manager** understands the rationale behind the adjustments and can plan accordingly.

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**

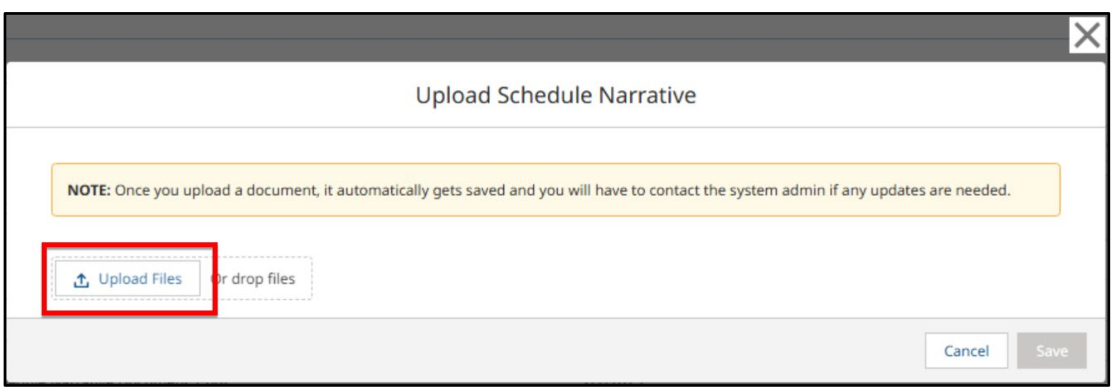


4. The user is directed to a **View/Upload Schedule Narrative** section.
5. Click the **Upload Schedule Narrative** button.

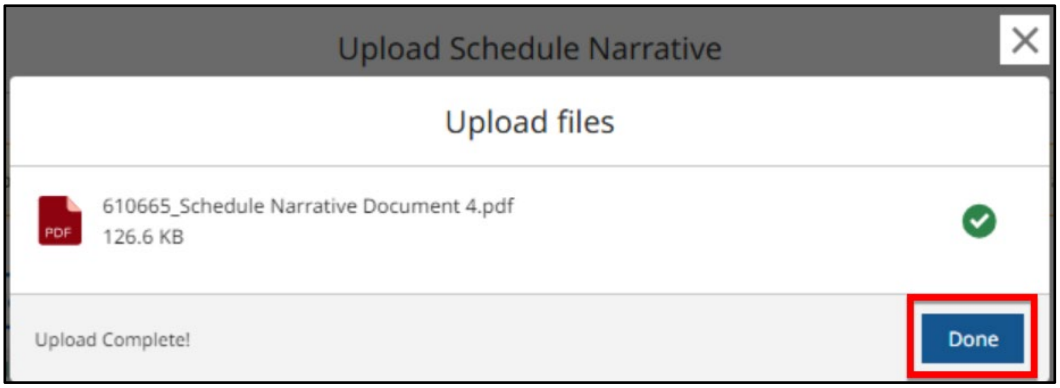


An **Upload Schedule Narrative** pop-up displays.

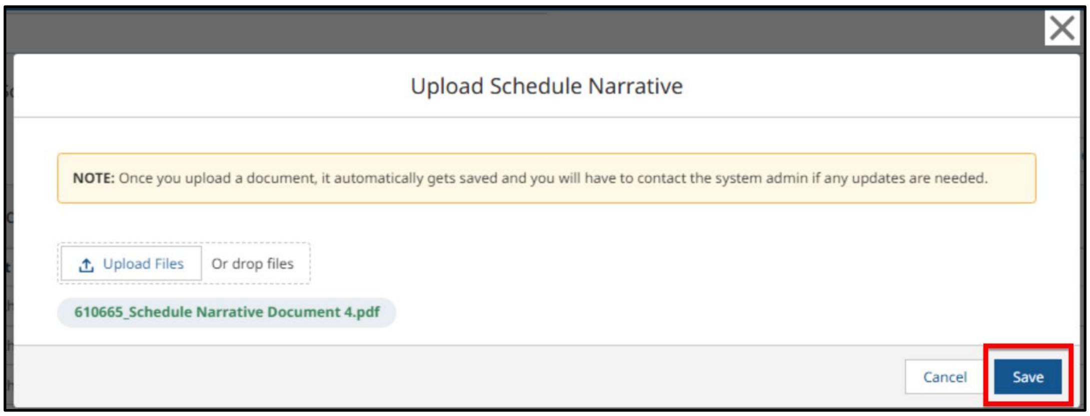
6. Click the **Upload Files** button or **drop files** to upload the required document(s).



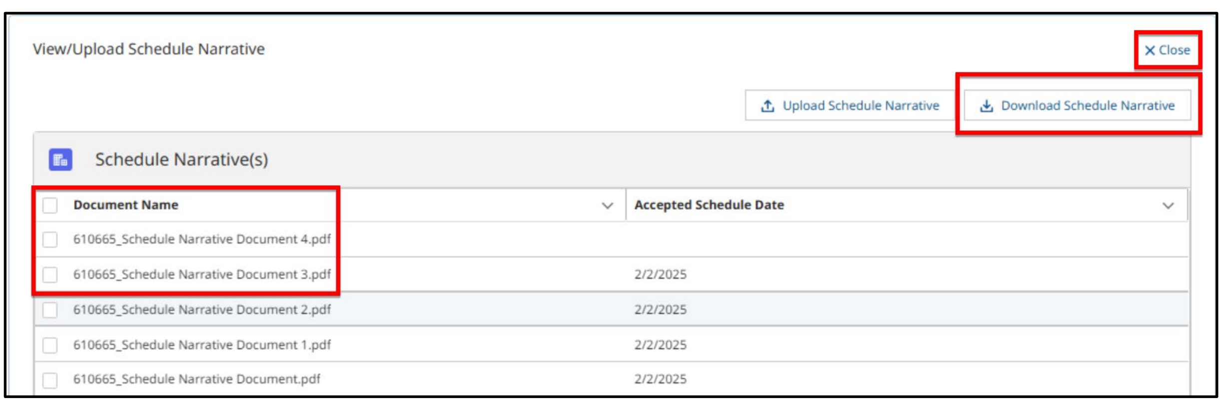
7. Click **Done**



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.

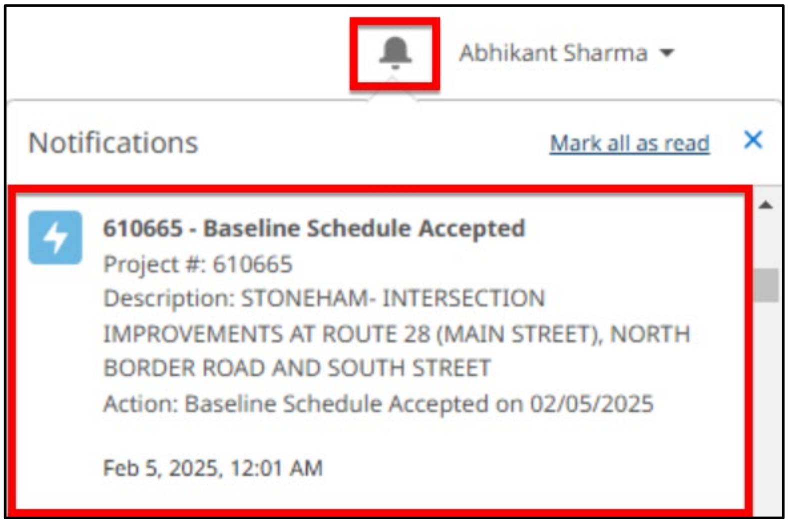


Note: Instead of uploading a **Schedule Narrative**, the External Design Lead Contact can also update the Project Manager using **Chatter** located on the Home Tab. Refer to the Chatter section for more details.

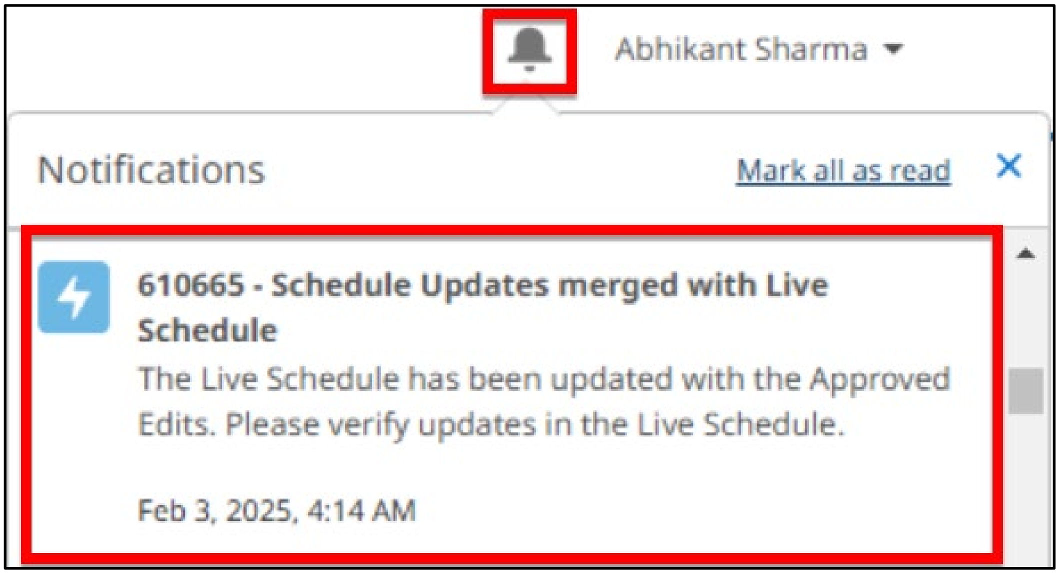
4.8 Baseline Schedule Accepted or Sent Back for Revision

4.8.1 Baseline Schedule Accepted

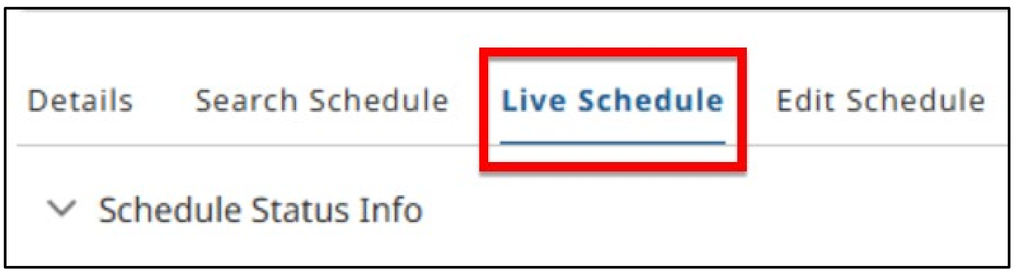
If the proposed Baseline Schedule is satisfactory, the Project Manager accepts the Baseline Schedule. The Design Lead Contact receives a Bell Notification and an Email notifying them of the Acceptance saying **Baseline Schedule Accepted**.



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."**



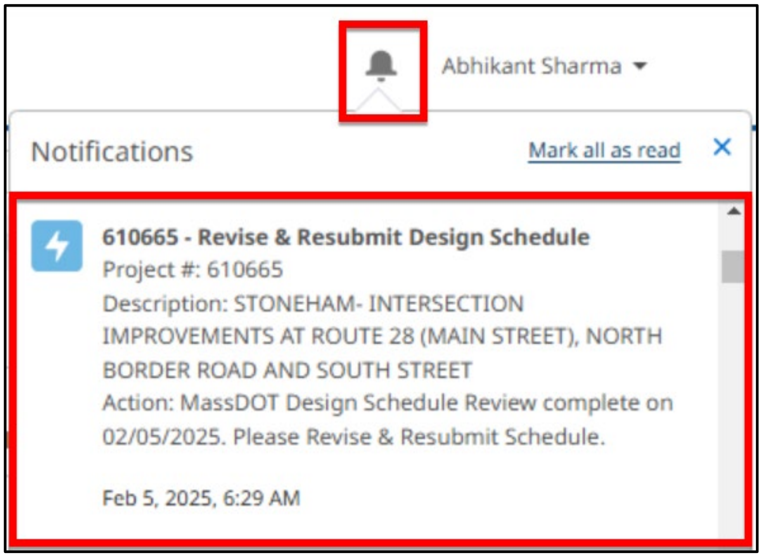
Upon receiving the notification, the External **Design Lead Contact** should navigate to the **Live Schedule** to verify that the **Baseline Schedule Updates** have been accurately merged under the **Live Schedule** tab.



4.8.2 Baseline Schedule Sent Back for Revision

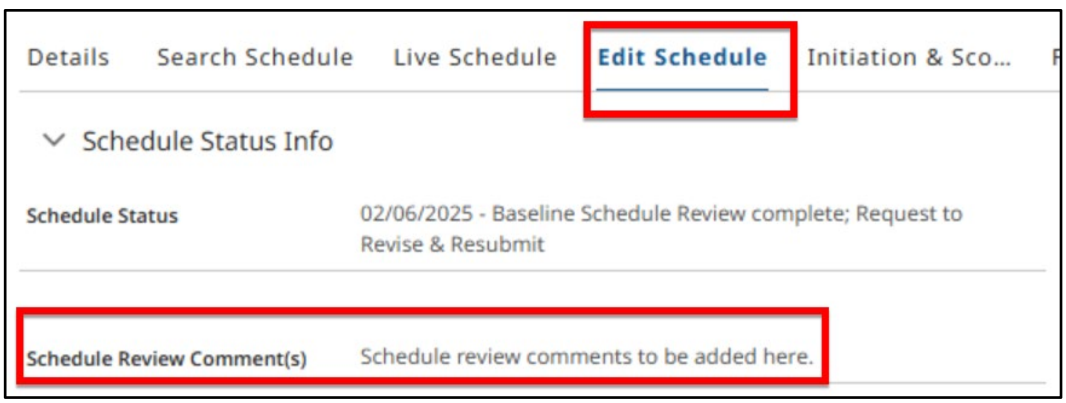
If the proposed Baseline Schedule is unsatisfactory, the Project Manager can send the Baseline Schedule back to **Revise and Resubmit** the Proposed Edits.

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.

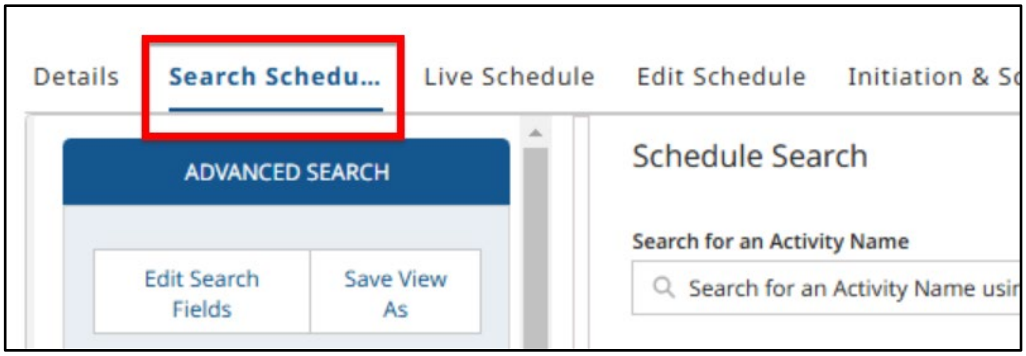


4. The Design Lead Contact can collaborate with the Project Manager using **Chatter** as well if needed. Refer to the Chatter section for more details on using Chatter.
5. The **Design Lead Contact** can update the **Edit Schedule** submitted based on the **Schedule Review Comments** received from the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

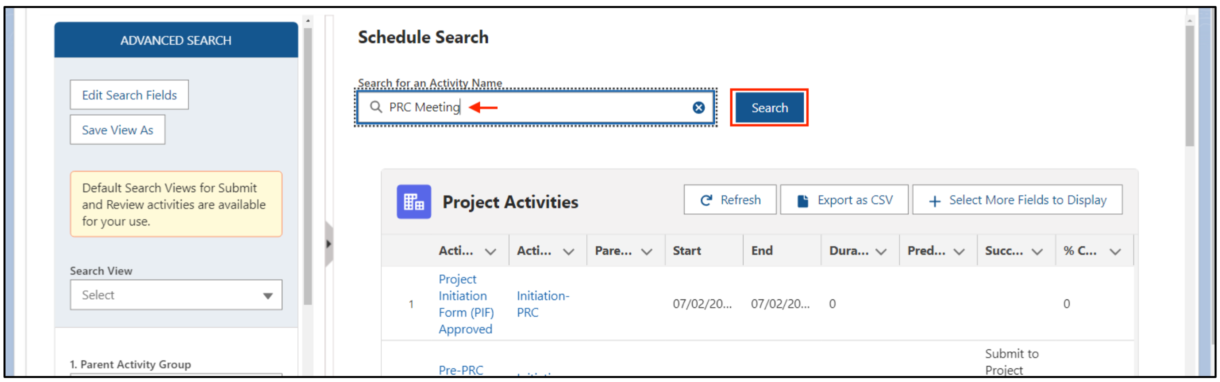
Go to the **Project** > **Search Schedule**.



4.9.1 Basic Schedule Search

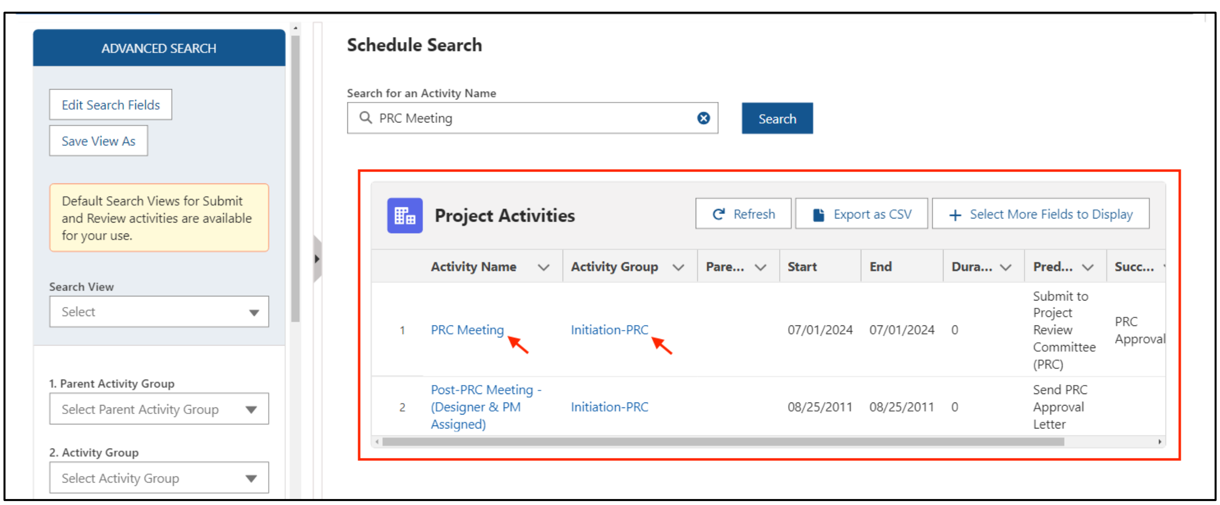
To search for an activity on the schedule using an Activity Name:

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.

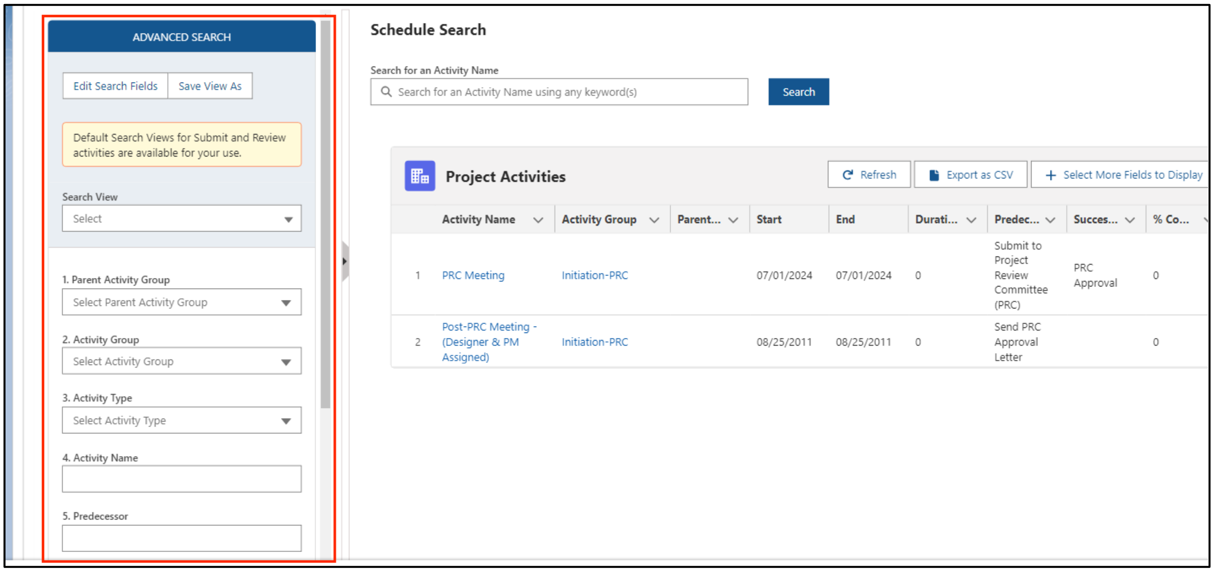
2. Click the **Activity Name** or **Activity Group** to go to the **Activity**. The Projects Activities table has several Display Columns such as Activity Group, Start, End, Duration, Predecessor, Successor, % complete, etc. Use the + **Select More Fields to Display button** to customize the columns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

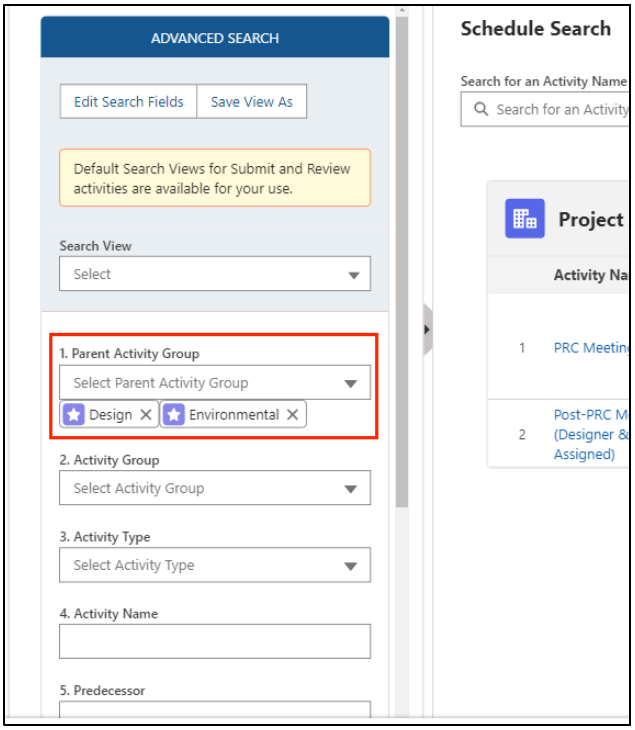
4.9.2 Advanced Search Panel

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.

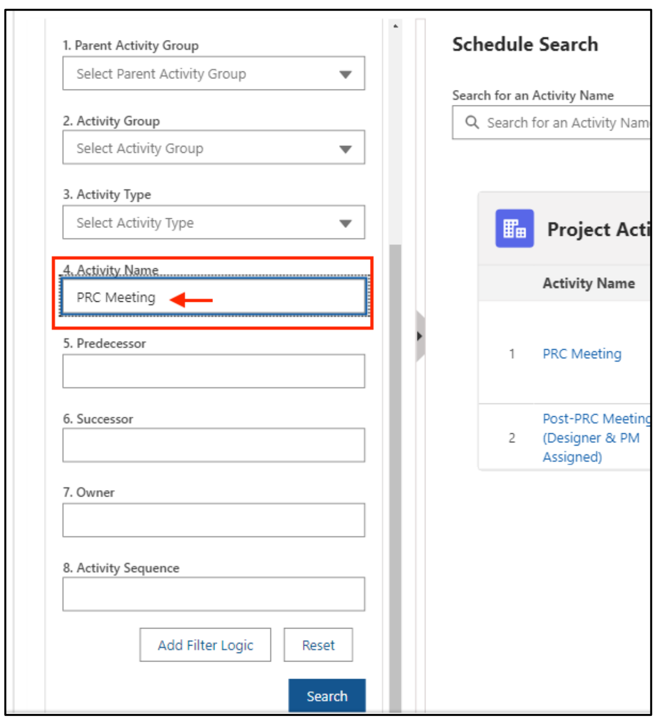


Some of the examples are:

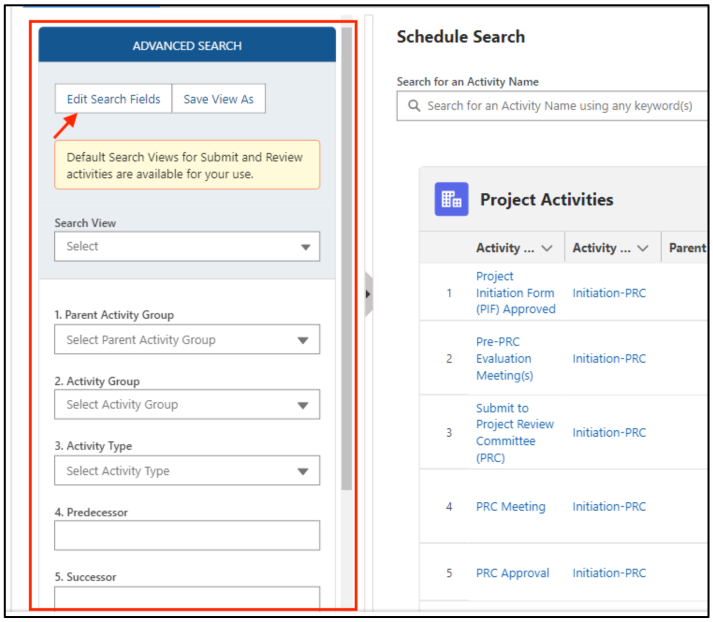
- Users can select one or more **Parent Activity Groups** from the dropdown options.



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



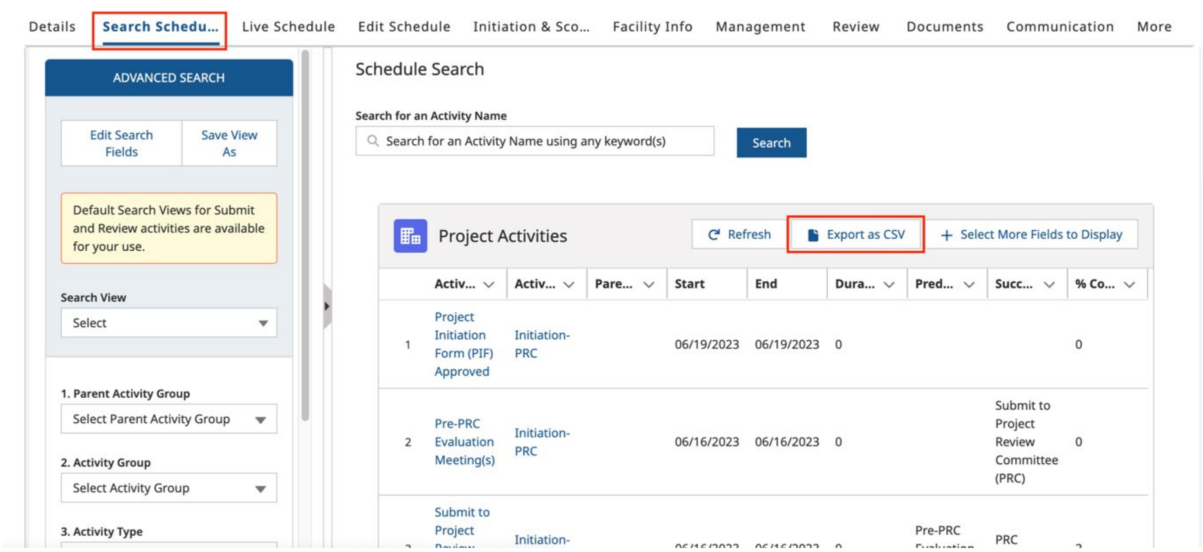
To adjust the Advanced Search fields, users can proceed by clicking the **Edit Search Fields** button on the left panel.



4.9.3 Export Project Activities as a Report

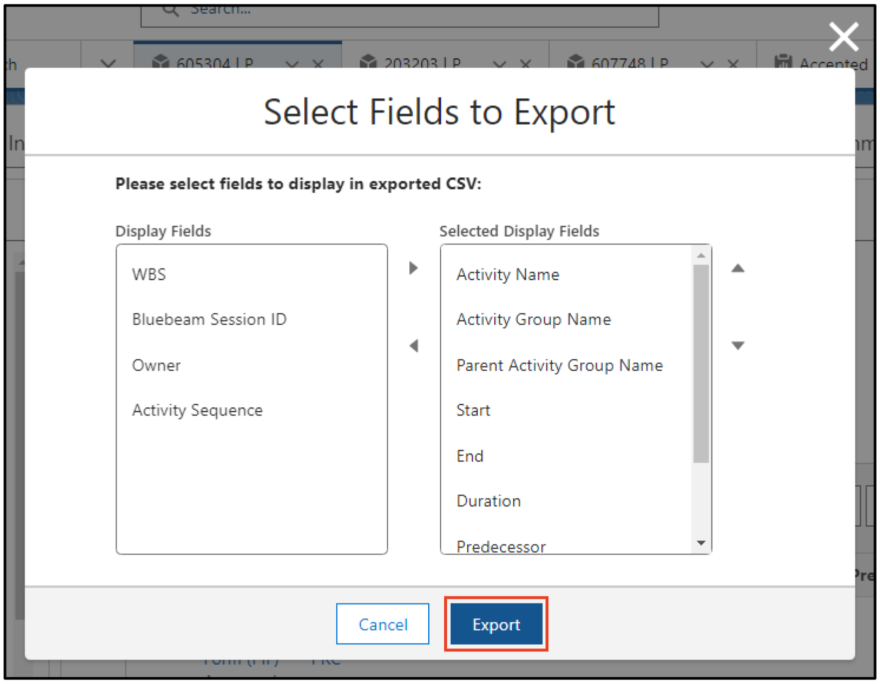
To export all the project activities on a Schedule as a report, follow the instructions below:

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

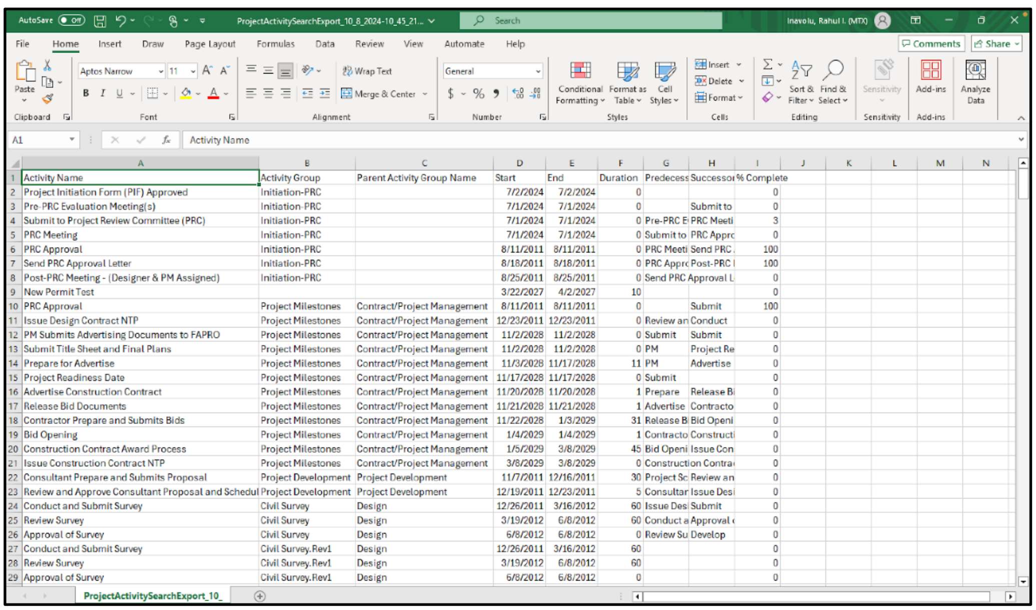


3. A **Select Fields to Export** pop-up displays.

   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.

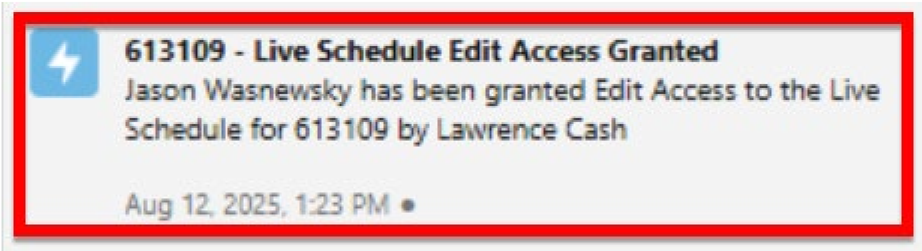


4.10 Making Schedule Updates to the Live Schedule

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:

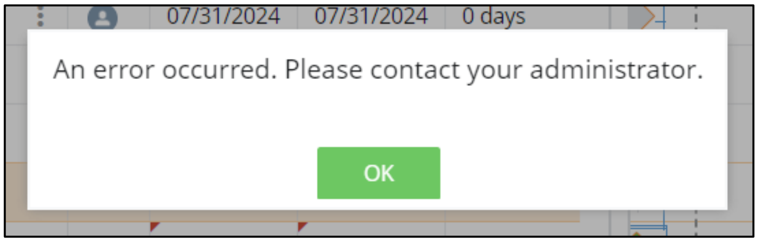
1. Activities Manually Scheduled
2. Changed End Dates and Durations
3. Activities marked as Not Applicable
4. New Activities/Activity Groups
5. Dependency Changes [If a User believes the dependencies of an activity are incorrect, they should email **Project Controls** to verify them.]
   Important: Revised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



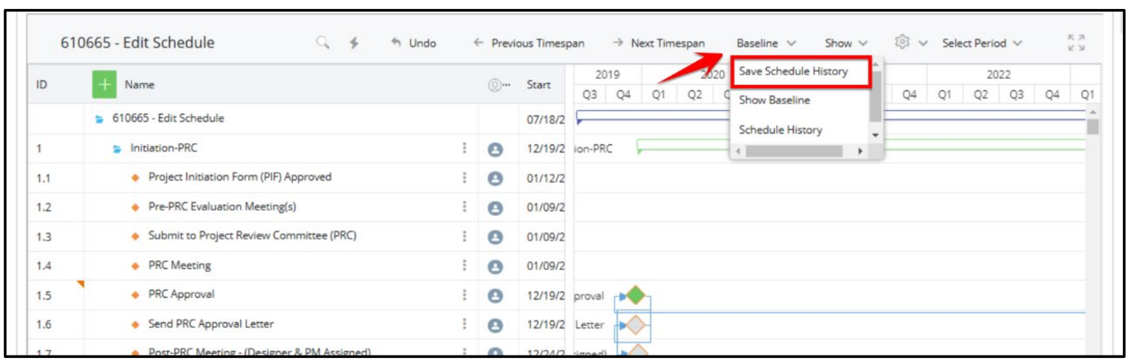
The External Design Lead Contact can make updates to existing **Activity Groups**, **Activities**, and **Milestones**, or add new **Activity Groups**, **Activities**, or **Milestones** to the **Edit Schedule**.

4.10.2 Adding a Snapshot

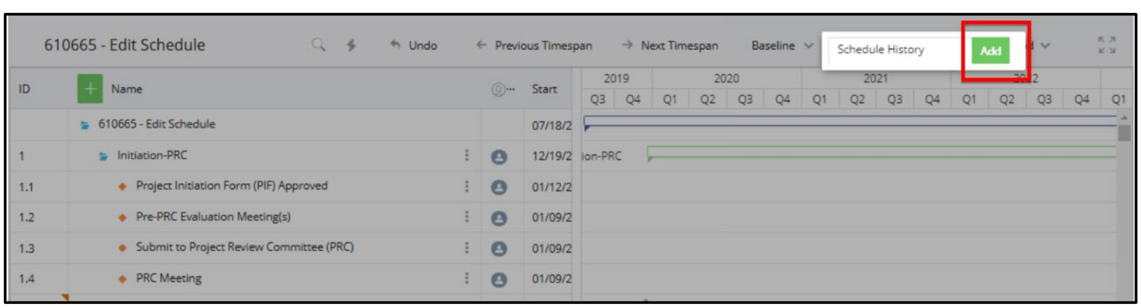
A Snapshot should be added on the Edit Schedule to check the Total Slack and Delta between the End Dates, for comparing two versions of the Edit Schedule.

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

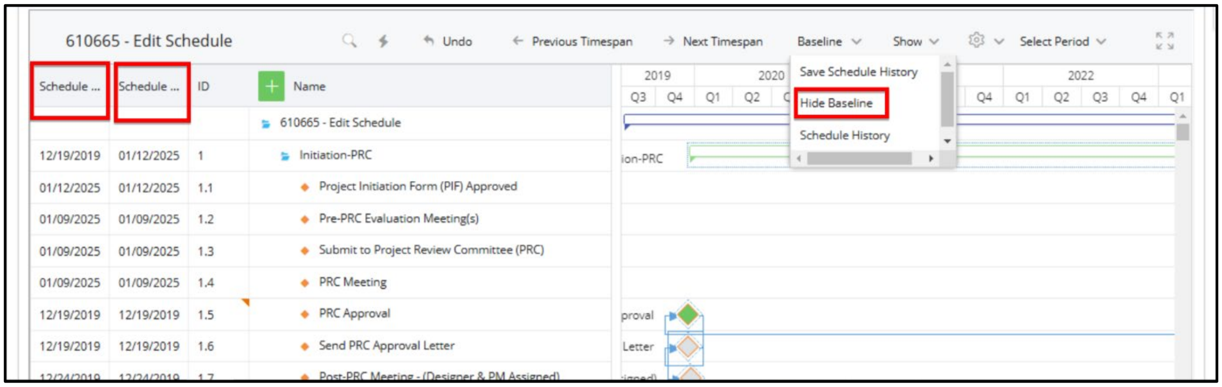
1. Go to the **Project.**
2. Go to **Schedule > Edit Schedule.**
3. Click on the **Baseline** dropdown and select the **Save Schedule History** option.



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.

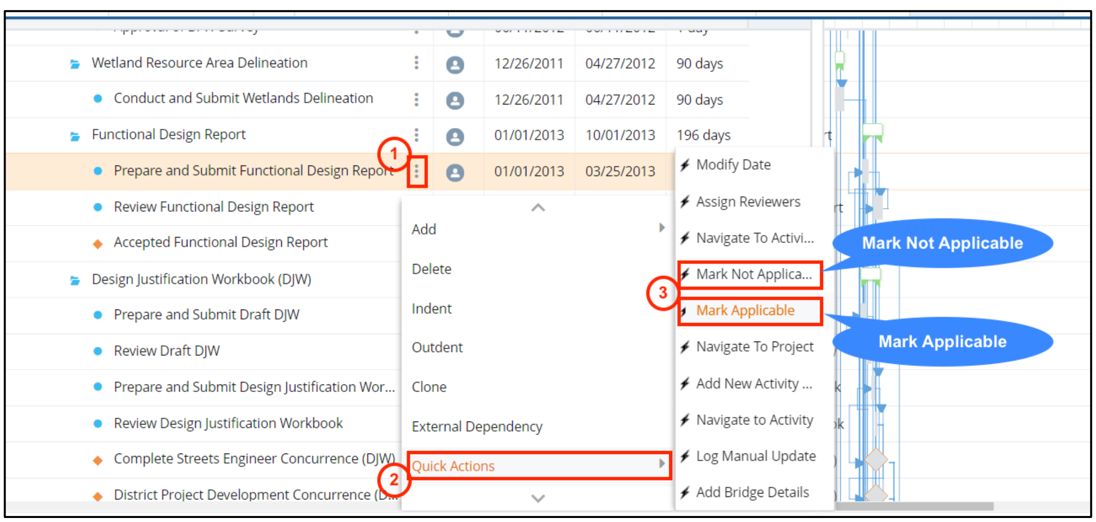


4.10.3 Marking Activities/Activity Groups as Applicable/Not Applicable

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.

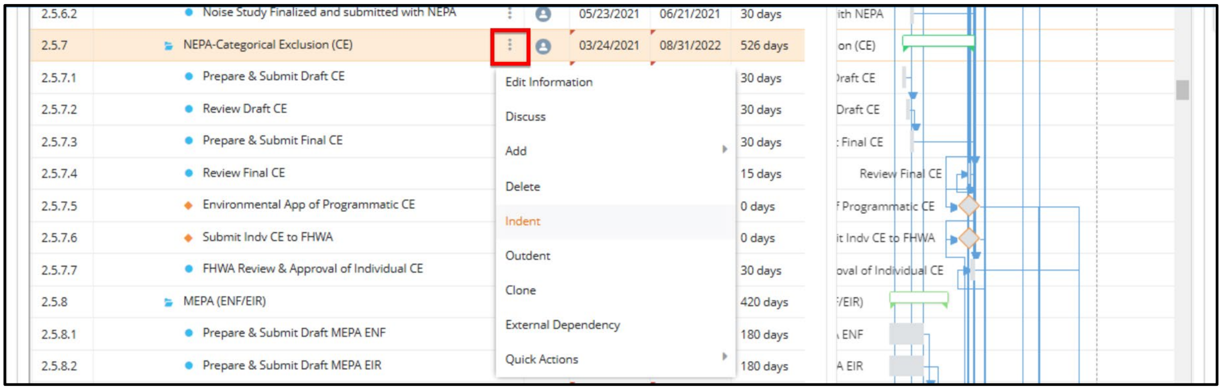


Note: When an **Activity/Activity Group** is marked as **Applicable** again, the **Not Applicable** sticker is removed. However, the **Activity Duration** and **Dependencies (Predecessors/Successors)** must be updated manually.

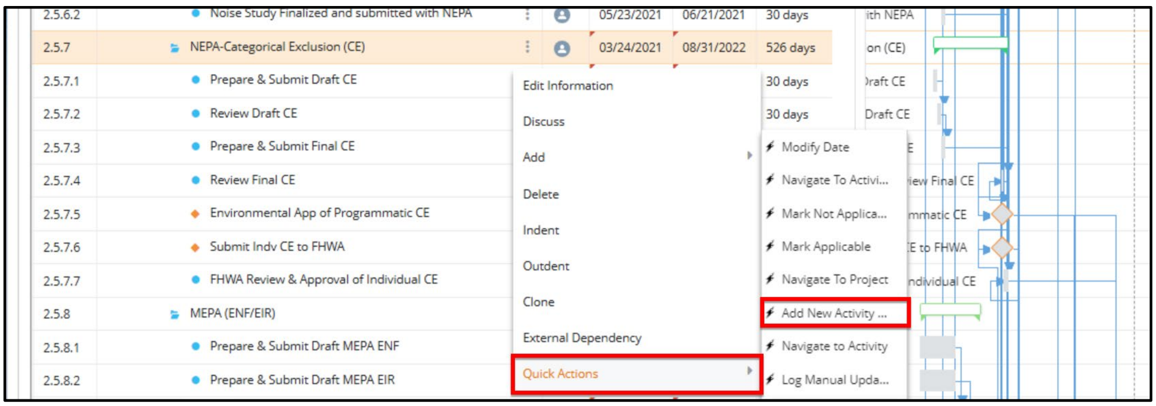
4.10.4 Adding Activity Groups

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

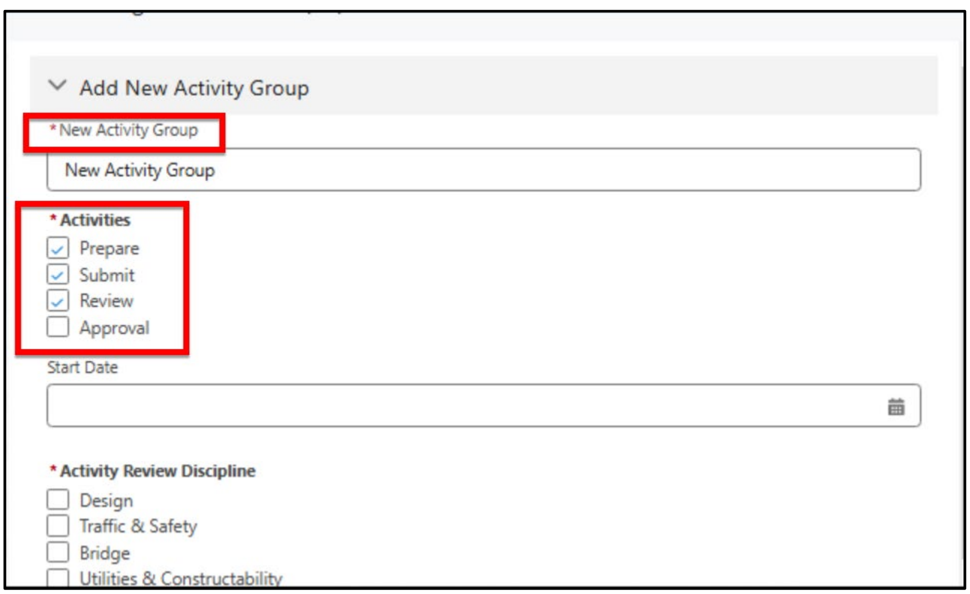
1. Locate an existing **Activity Group** below which the new Activity Group needs to be added.
2. Click on the vertical ellipses (three vertical dots)



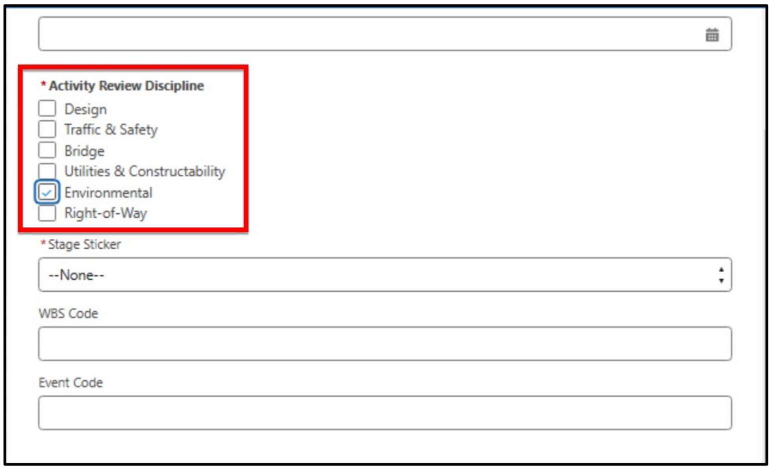
3. Click on **Quick Actions > Add New Activity Group**



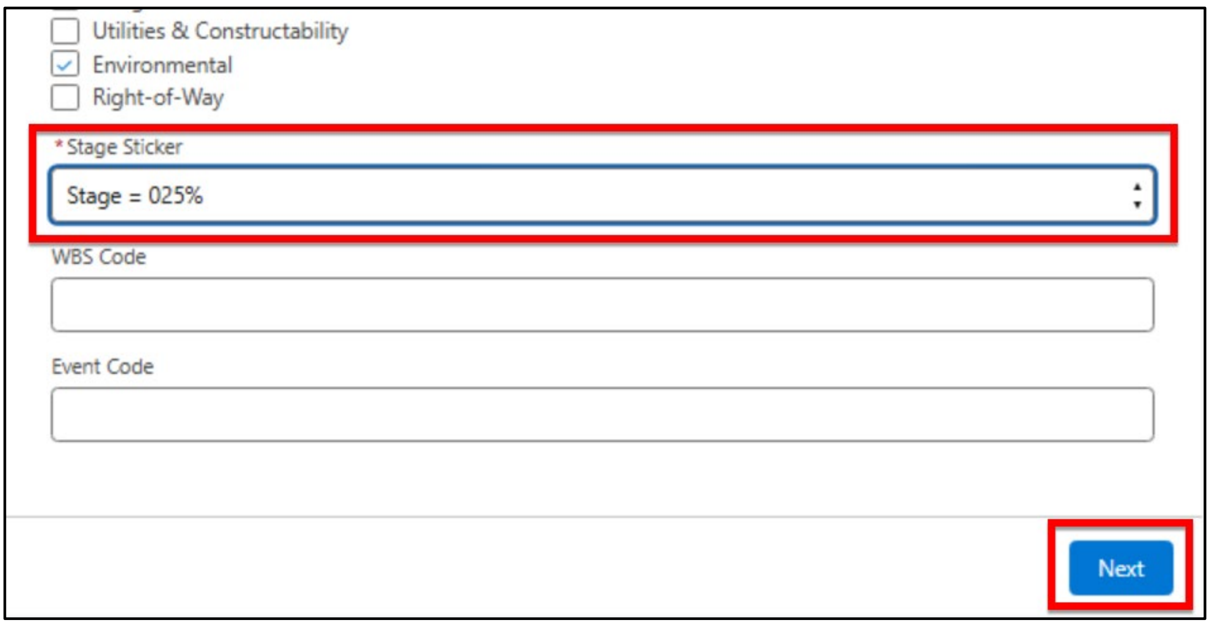
4. Enter a **New Activity Group** name and select **Activities** needed under the new Activity Group



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



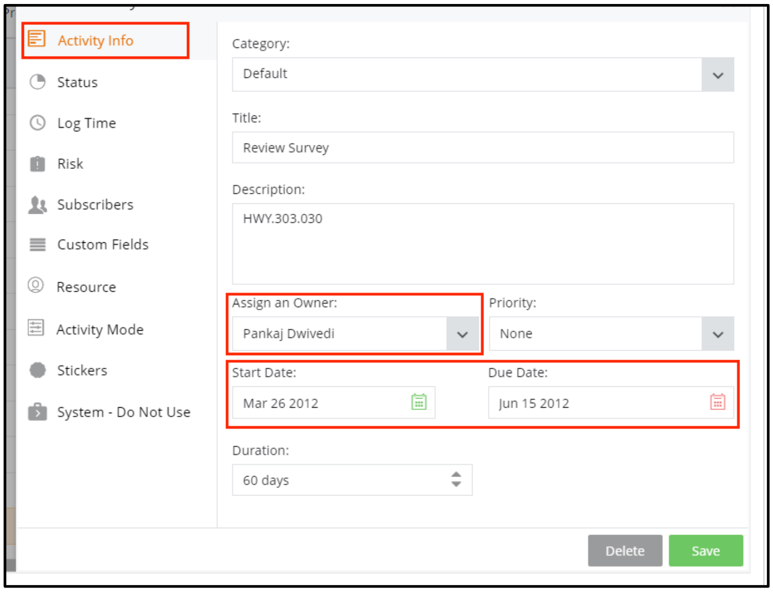
6. Select a **Stage Sticker** which is applicable for the **New Activity Group** and click **Next**.



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

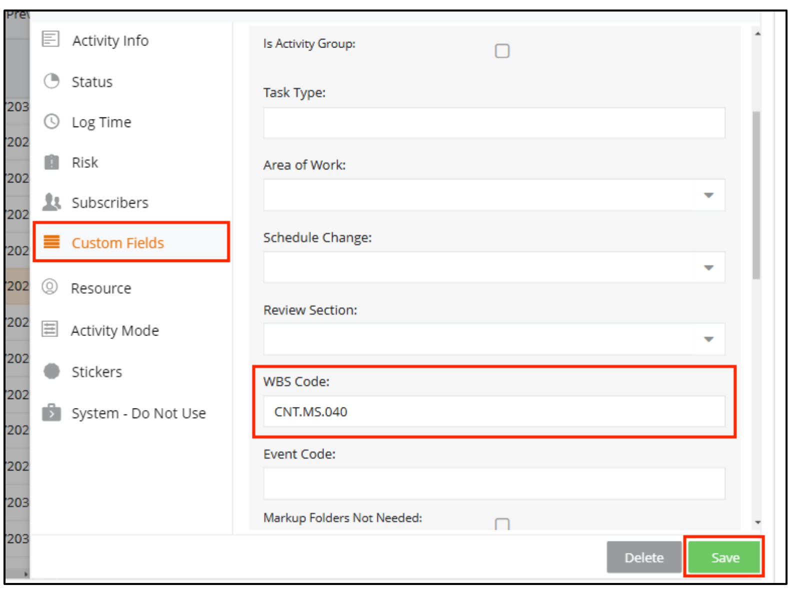
8. Update the **Dependencies** (Predecessors and Successors) if it is not a linear dependency. Refer to the Editing Dependencies section.

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 Da**te 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**.



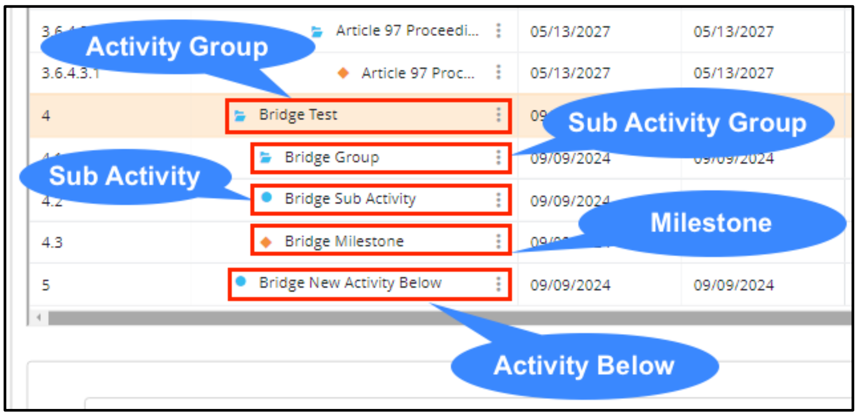
Note: The **WBS Structure** has been carefully developed to reflect the Area of Work and the Division/Subdivision of Work as defined in the Scoping Workbook. The **WBS Structure** should not be modified under any circumstances. Reach out to Project

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

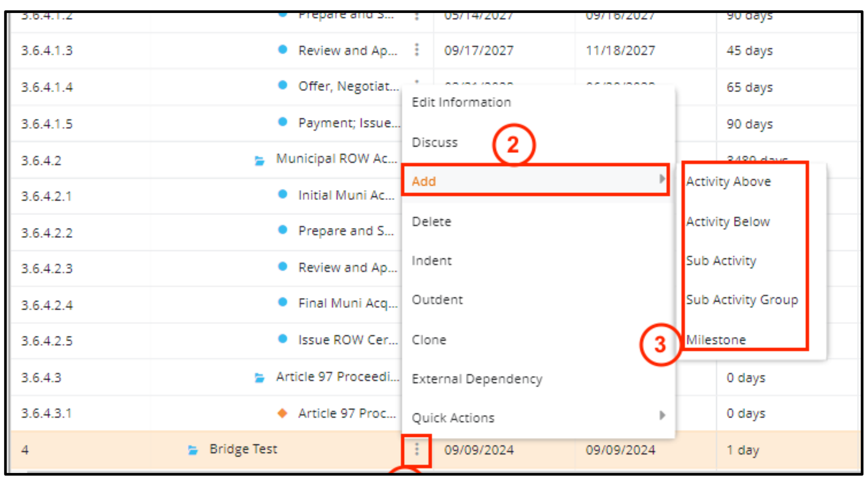
12. Similarly, update the **WBS Code** for all the Activities/Milestones under the New Activity Group.

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

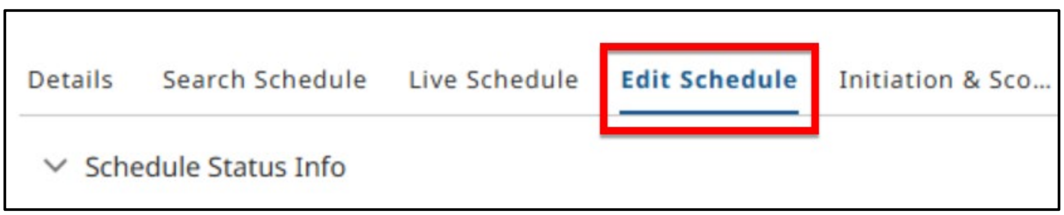
The Design Lead Contact can propose **Dependency (Predecessors/Successors)** changes under the **Edit Schedule**. Refer to the Editing Dependencies section for more details.

4.10.8 Adding Resubmission Activity Group

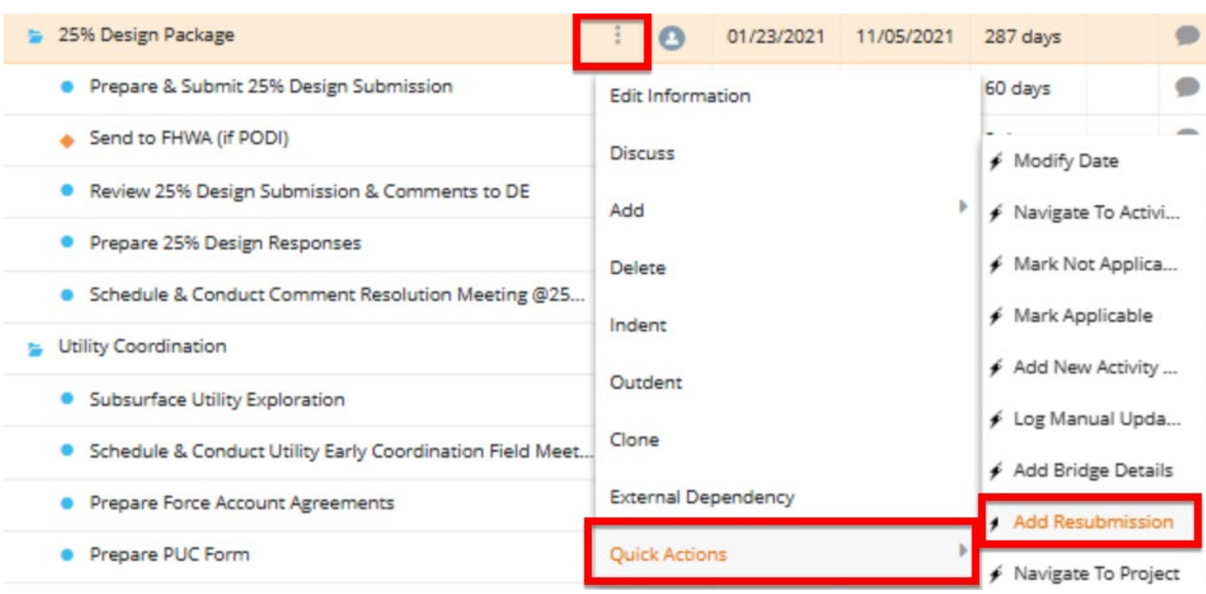
Resubmissions are primarily applicable to **Design Packages** but may not be relevant to all **Activity Groups**.

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

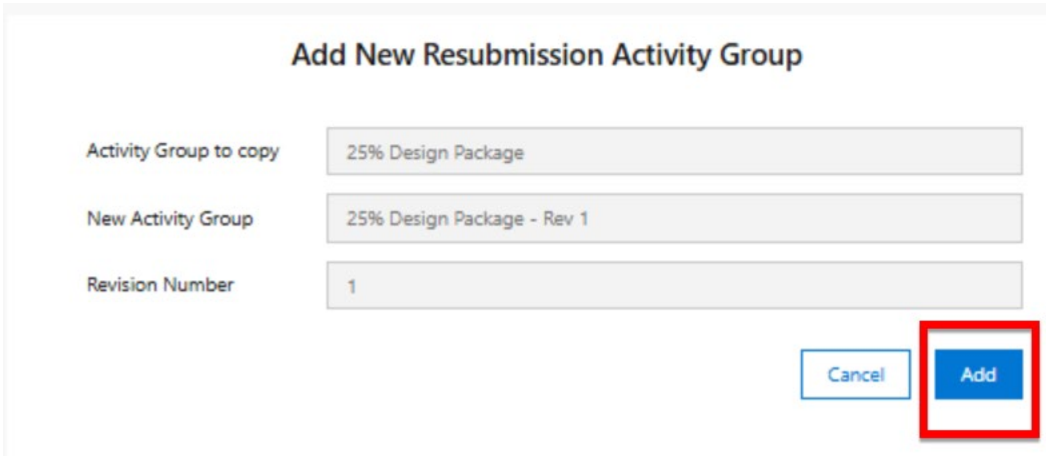
1. Go to the **Project**.
2. Go to the **Edit Schedule**.



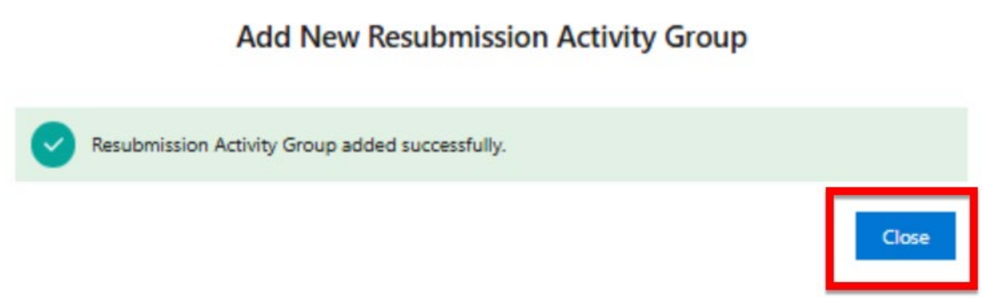
3. Locate the **25% Design Package** Activity Group.
4. On the **Activity Group,** click the **vertical ellipsis (three dots)** and select **Add resubmission** Quick action.



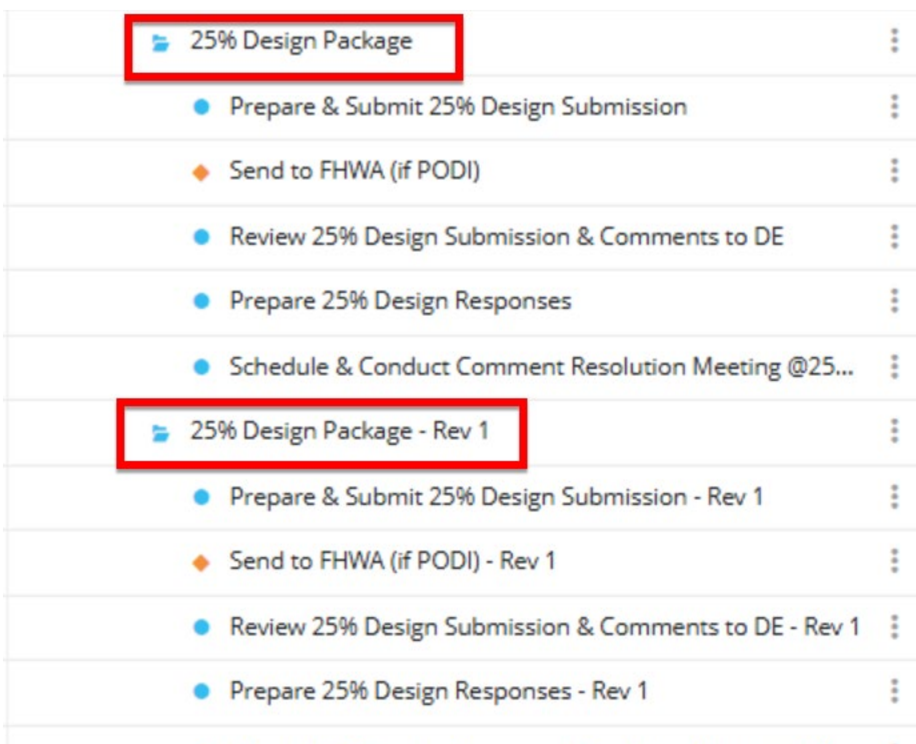
5. Click on **Add**



6. Click on **Close**



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



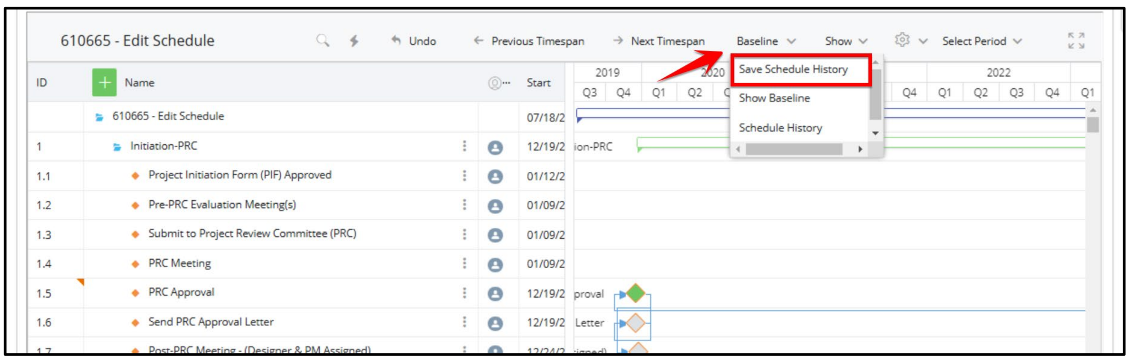
4.10.9 Reviewing Total Slack and Critical Path

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

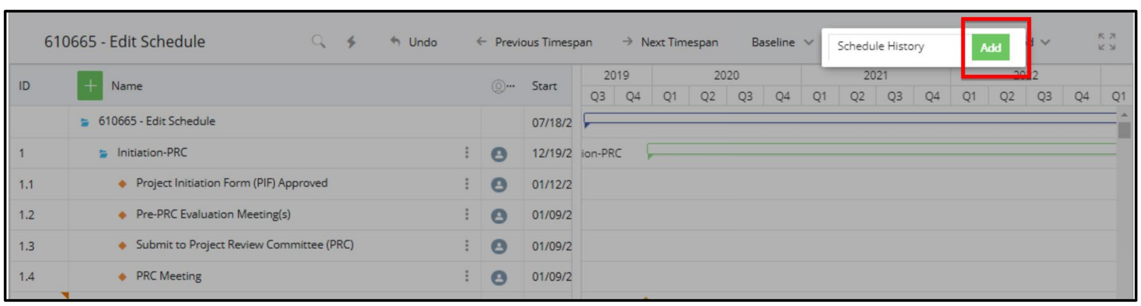
4.10.9.1 Adding a Snapshot

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

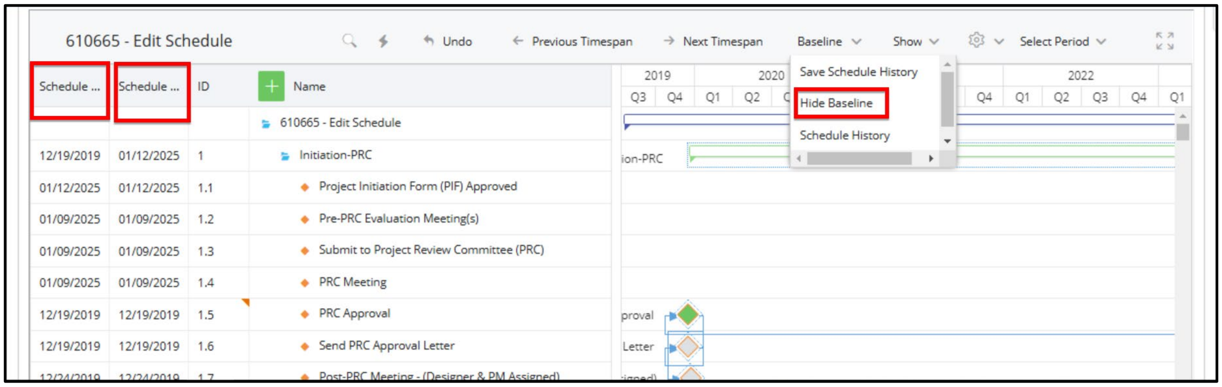
5. Go to the **Project.**
6. Go to **Schedule > Edit Schedule.**
7. Click on the **Baseline** dropdown and select the **Save Schedule History** option.



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.

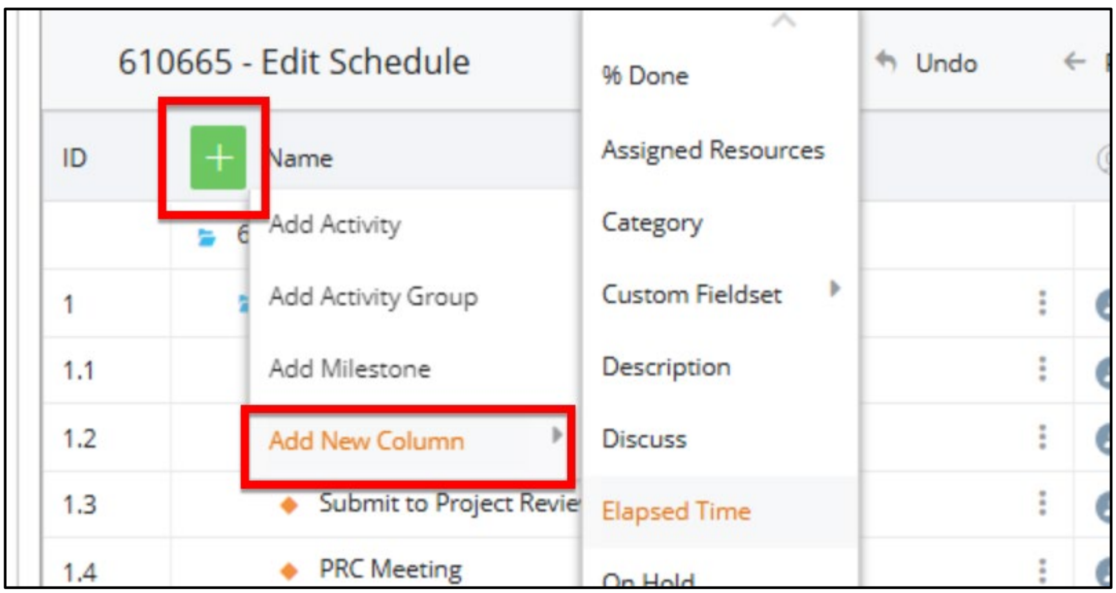


4.10.9.2 Reviewing Total Slack

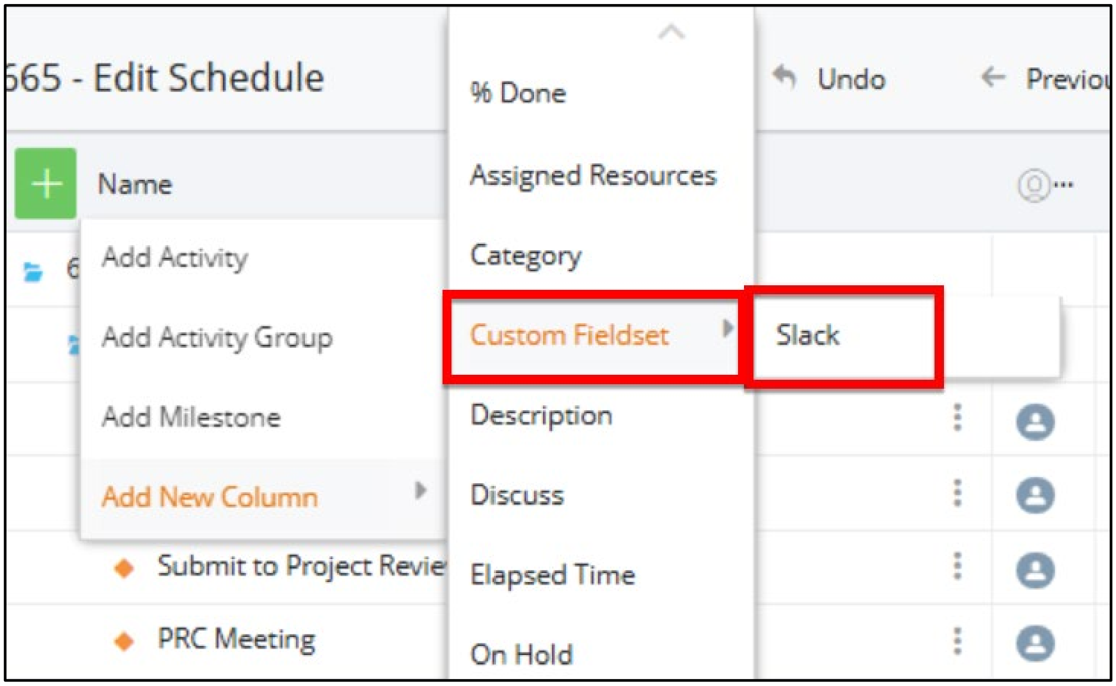
Total Slack determines the number of days a Schedule Activity can be delayed without impacting the Schedule End Date (i.e. the **Construction Contract NTP Date**).

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

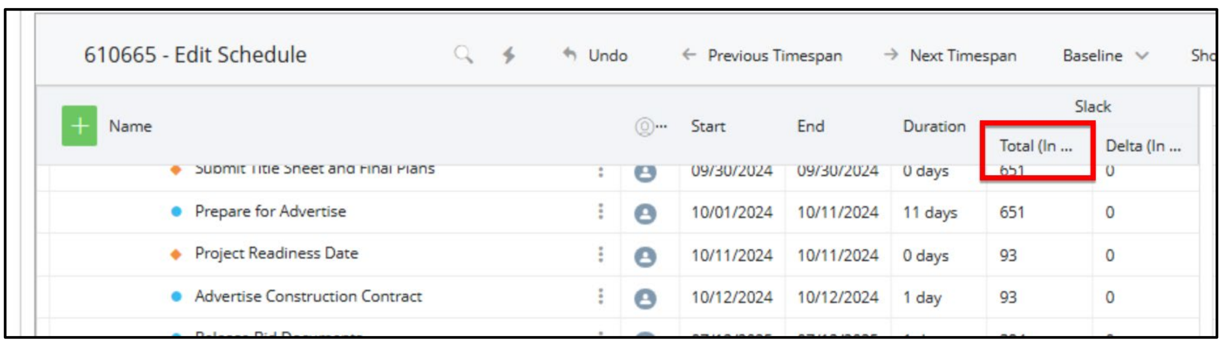
1. Click on the + icon near **Name** on the top left of the **Edit Schedule** and select the **Add New Column** option.



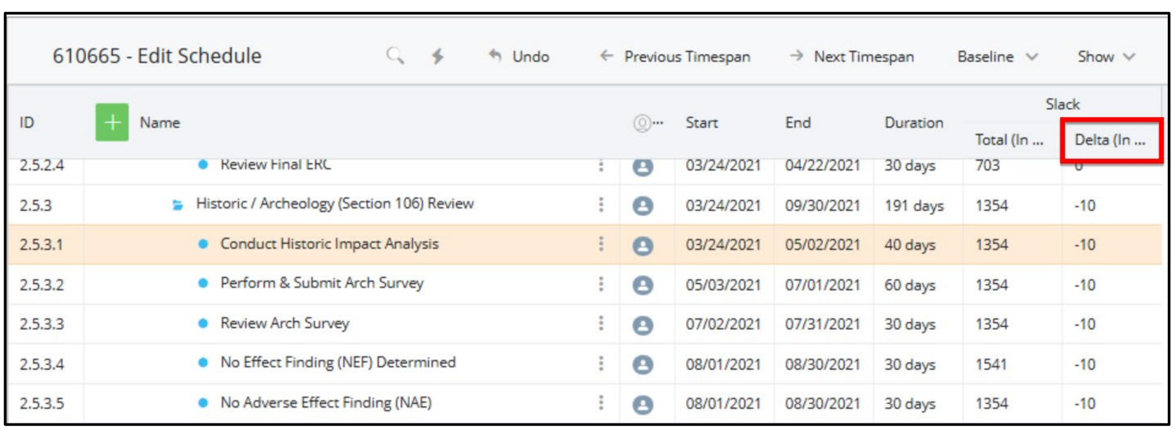
2. Click on **Custom Fieldset** and select **Slack**



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



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



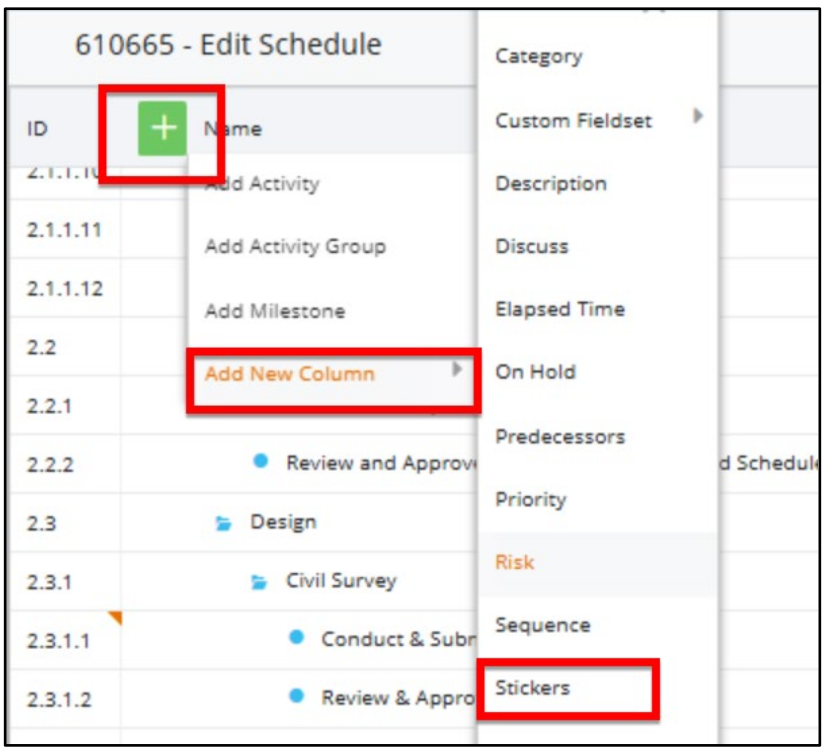
4.10.9.1 Reviewing Critical Path

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.

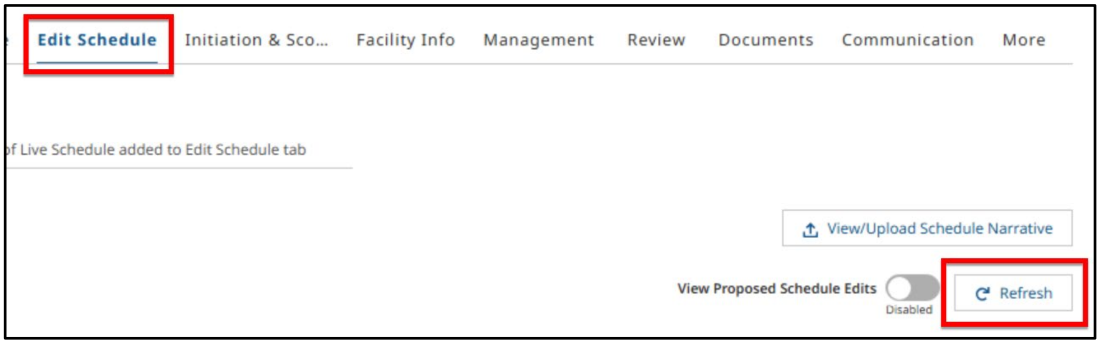
To review the Activities on the **Critical Path** on the **Edit Schedule**:

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

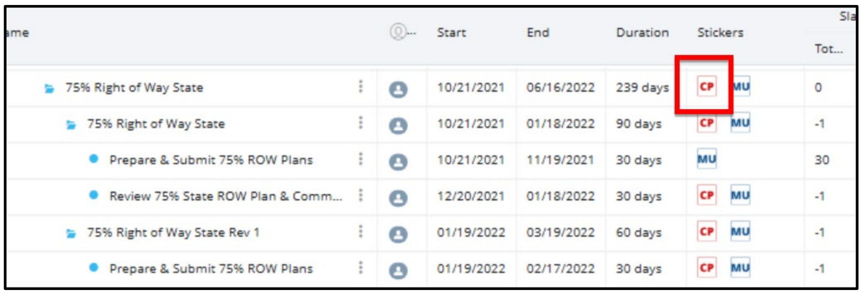


3. Click the **Refresh** Button.

   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.



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.

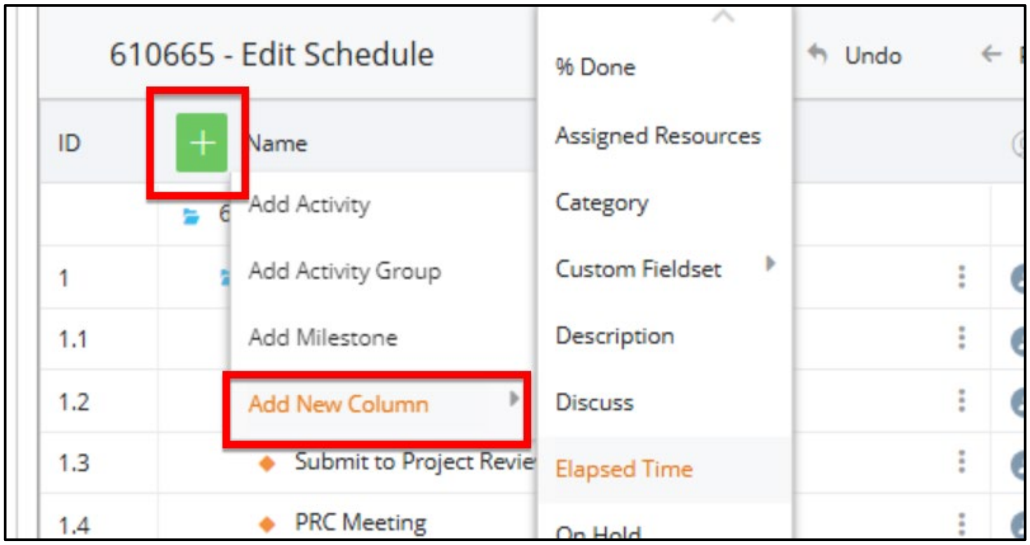
4.10.9.2 Reviewing End Date Delta

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

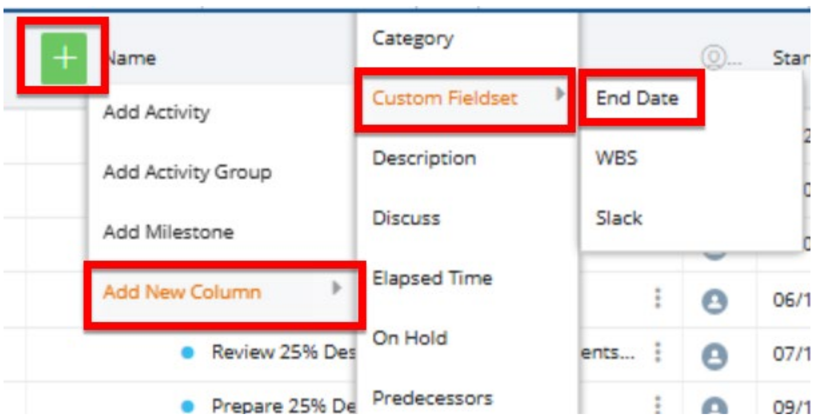
End Date Delta is the difference between the End Dates of the Schedule Activities between the first snapshot and the latest snapshot taken on the Edit Schedule. **End Date Delta** = (End Date of the Activity in the First Snapshot taken after creating a Copy) - (End Date of the Activity in the Latest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

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

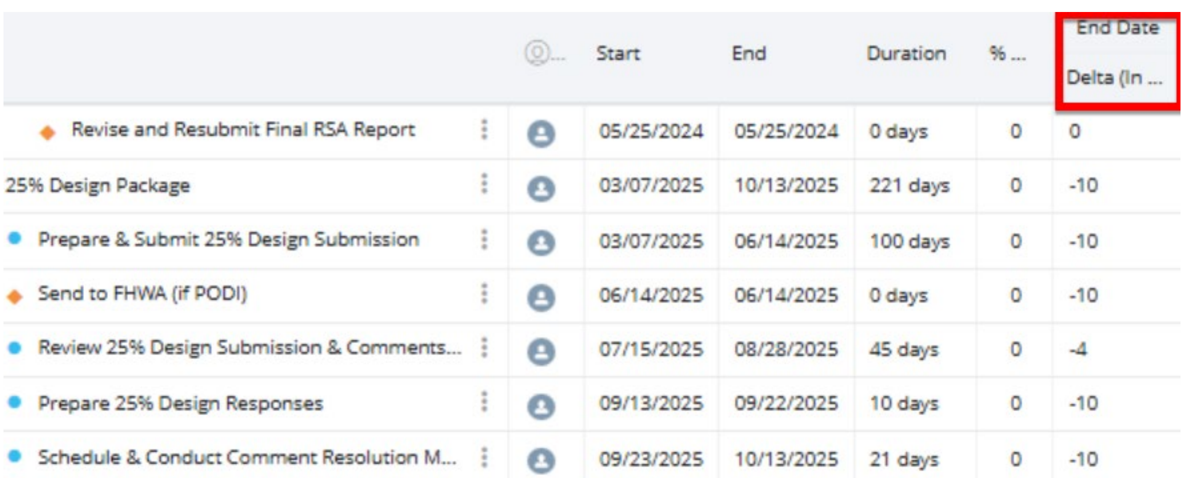
1) Click on the + icon near Name on the top left of the Edit Schedule and select the Add New Column option.



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

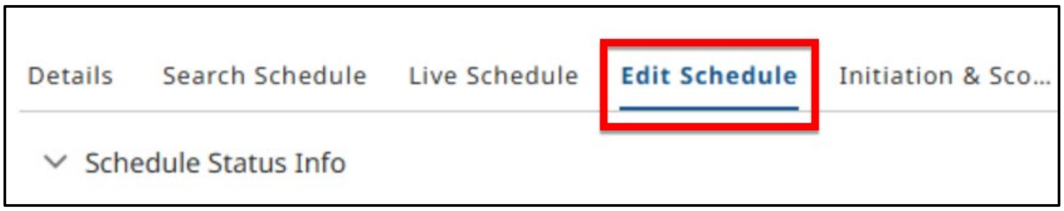
4.10.9.3 Reviewing Ad Date on the Edit Schedule Gantt Chart

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.

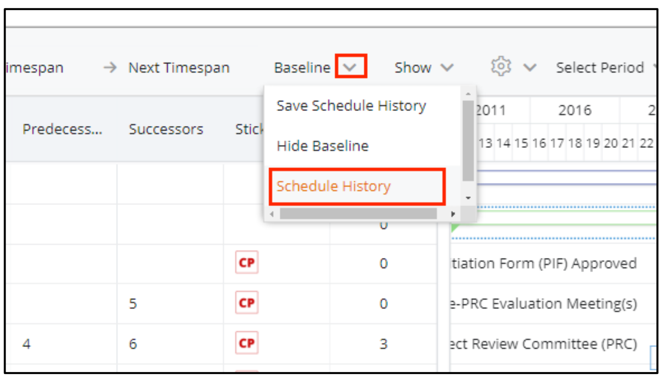
4.10.10 Viewing Schedule History

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:

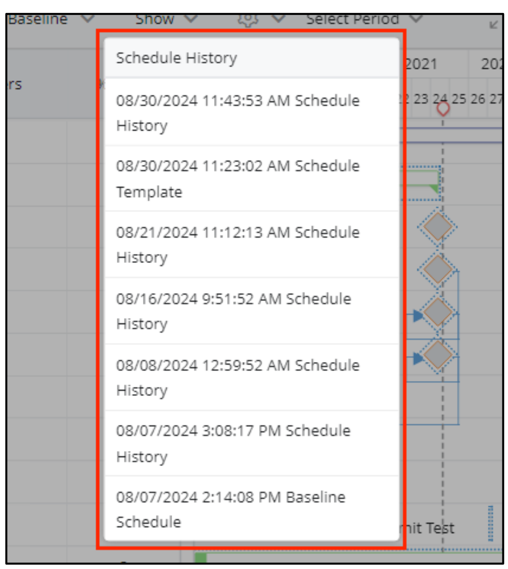
1. Go to the **Project.**
2. Go to the **Edit Schedule**.



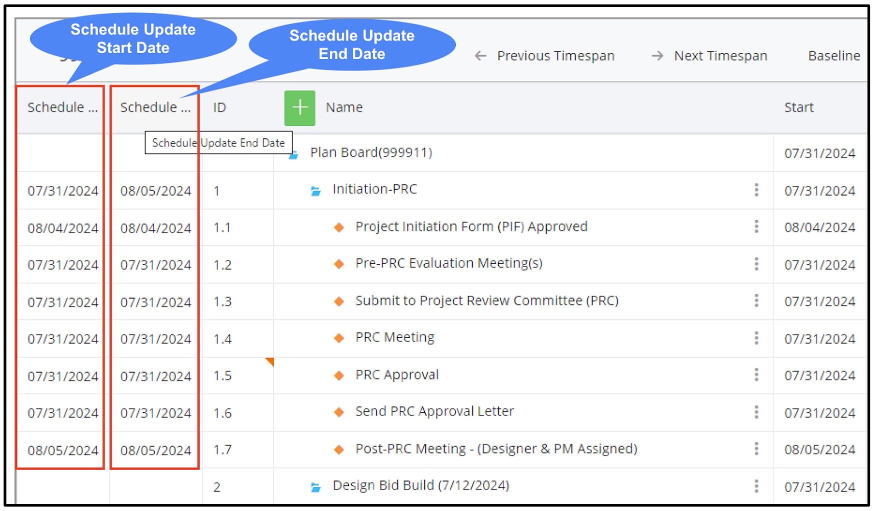
3. On the **Edit Schedule,** click the down arrow next to **Baseline** and select the **Schedule History** option.



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



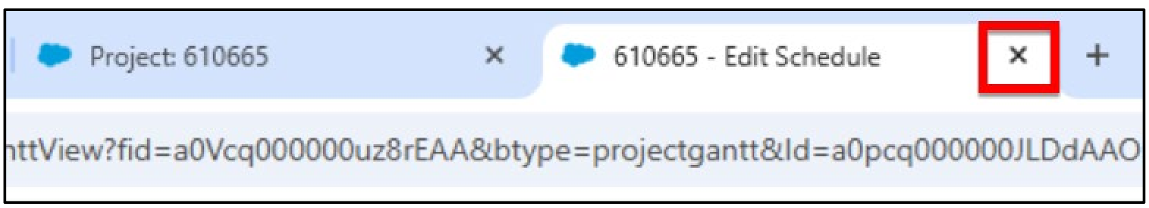
When the user clicks on the **Schedule History** snapshot, columns for the schedule's **Start Date** and **End Date** will be added. This allows the user to compare the data and manually reconstruct or update the schedule as needed.



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.



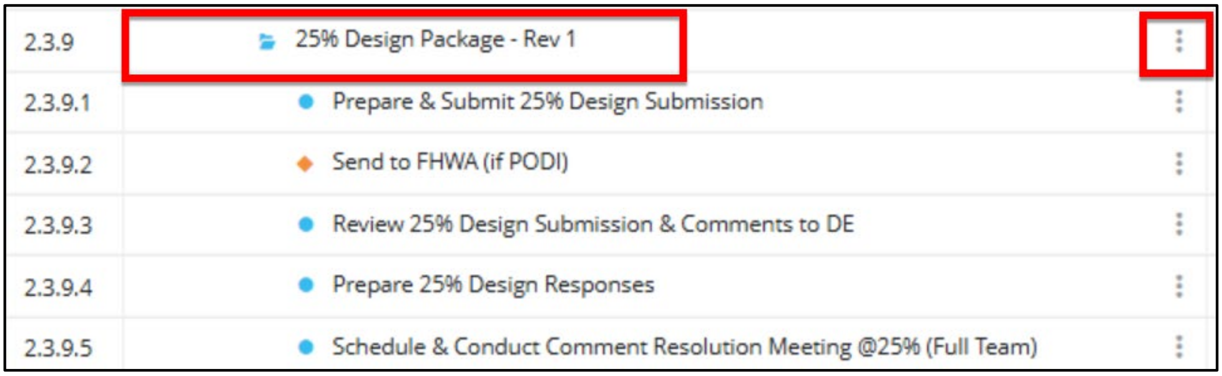
2. Click on the **Refresh** button under the **Edit Schedule** tab.

   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.

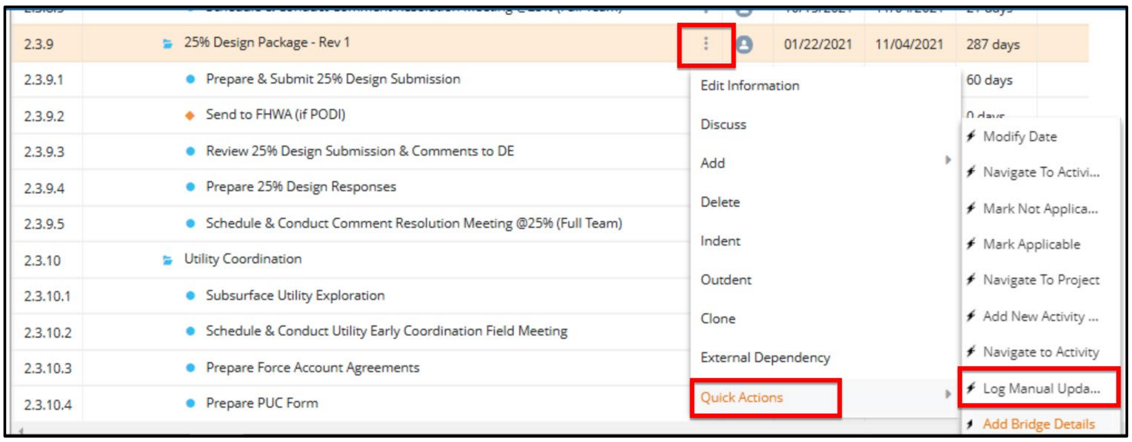
If the user proposes updates to an Activity/Activity Group manually, the update must be **Logged as a Manual Update** under the Edit Schedule.

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)**



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

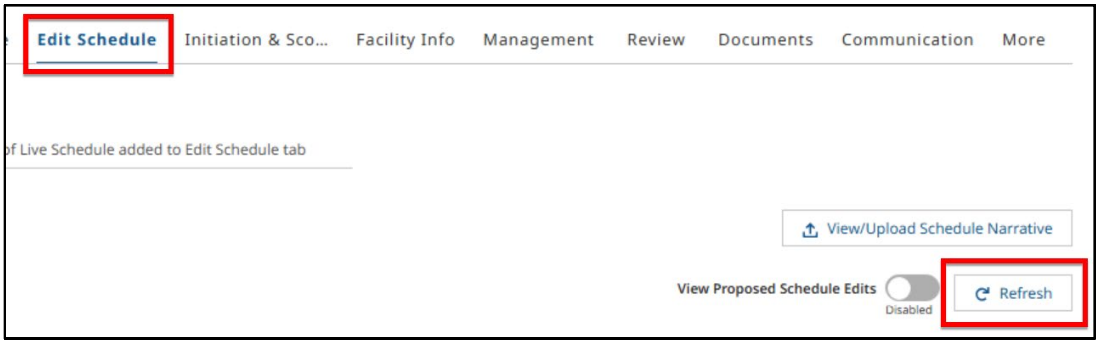


5. A blank pop-up will briefly appear and then close automatically, as shown below.

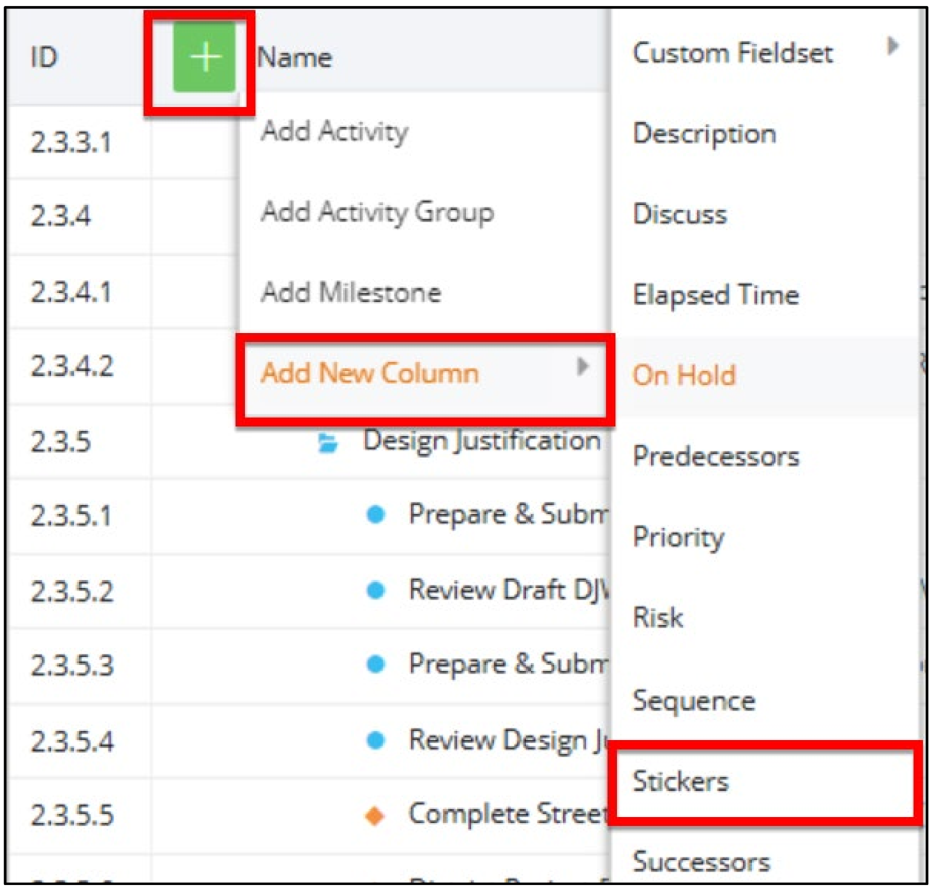
After logging a manual update, a **Manual Update (MU)** sticker will be automatically added to the selected Activity Group/Activity.

6. Click **Refresh**.

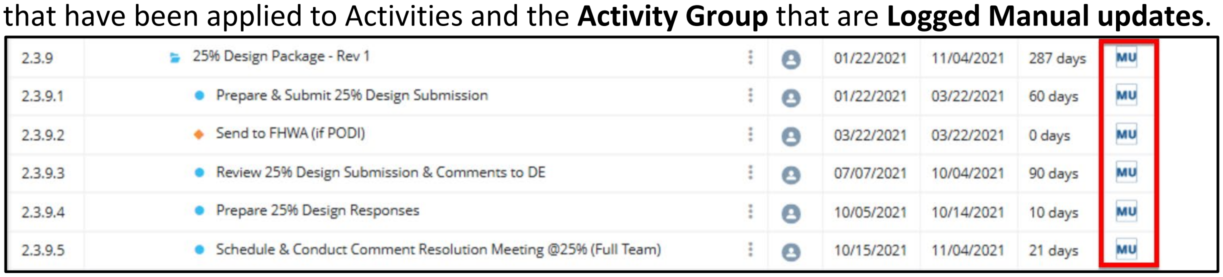
   Note: The schedule requires a **Refresh** to display the added **Stickers**. Therefore, when reviewing the **Manual Update** Sticker, ensure to click on the **Refresh** button.



7. To view the **Manual Update** stickers on the **Edit Schedule**, Click the **+** icon at the top left of the **Edit Schedule**.
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**.

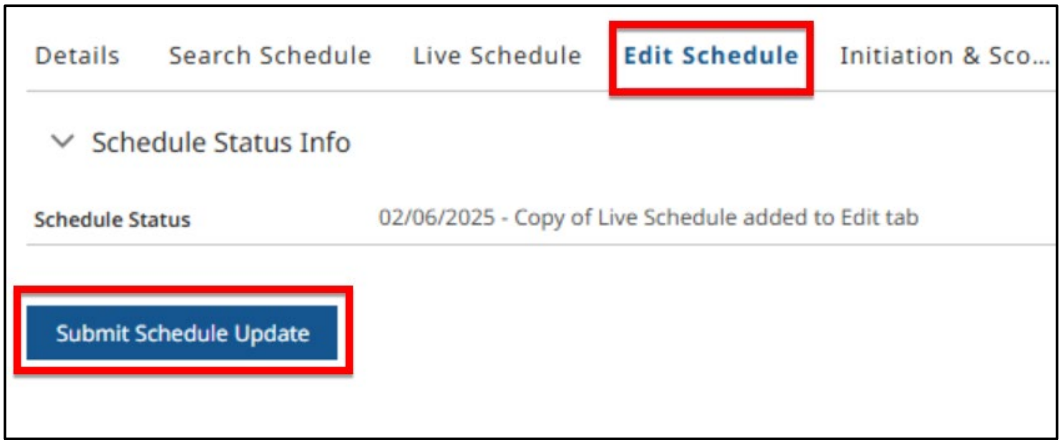


4.10.12 Submitting Schedule Update

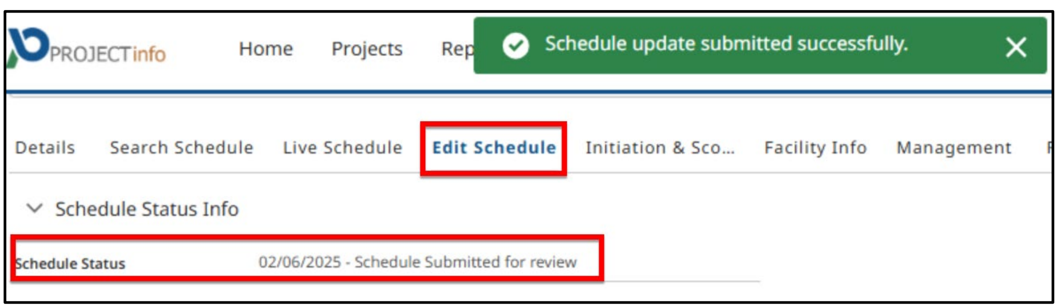
Once the proposed updates are completed and are **Logged Manual Updates** on the **Edit Schedule** tab, the External Design Lead Contact can submit the proposed changes for the Project Manager's approval.

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.

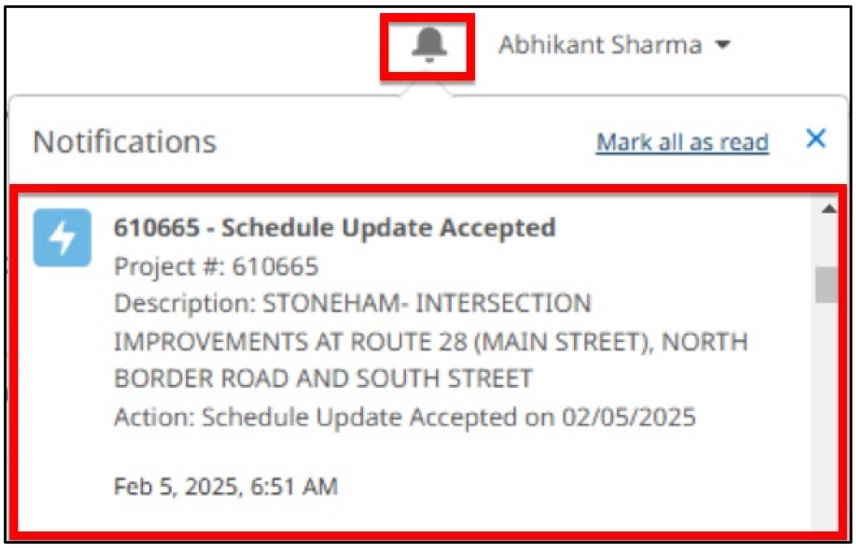
4.10.14 Uploading the Schedule Narrative Document

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.

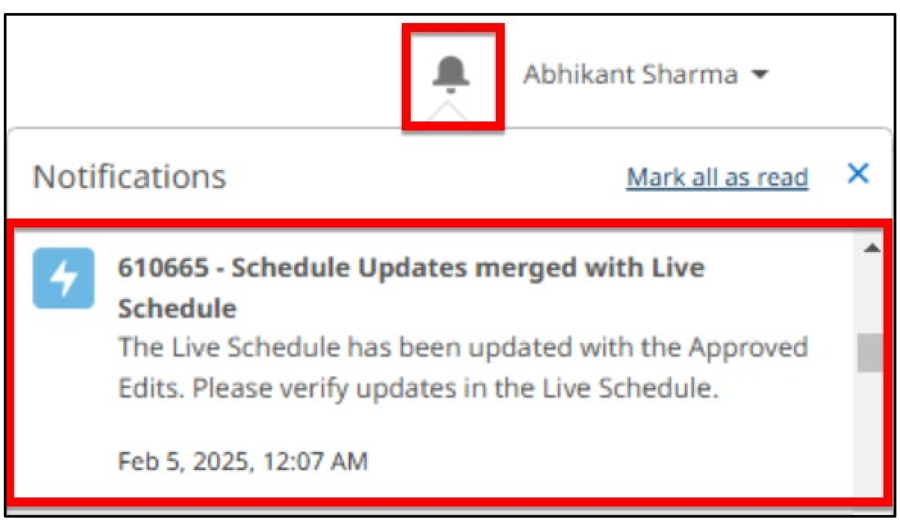
4.11 Schedule Update Accepted or Sent Back for Revision

4.11.1 Schedule Update Accepted

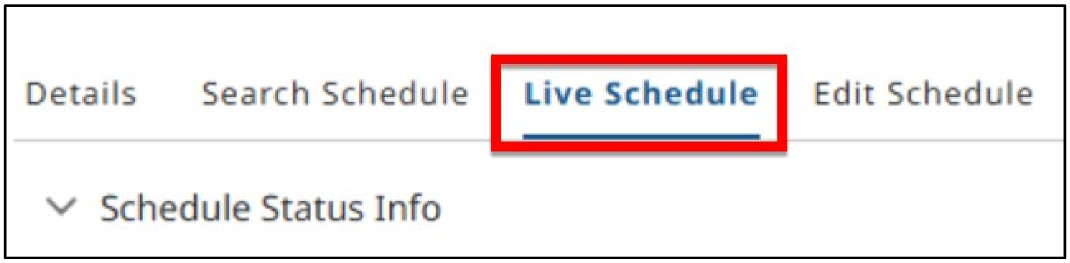
If the proposed Schedule Update(s) are satisfactory, the Project Manager accepts the Schedule Update(s). The Design Lead Contact receives a Bell Notification and an Email notifying them of the Acceptance saying **Schedule Update Accepted**.



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.



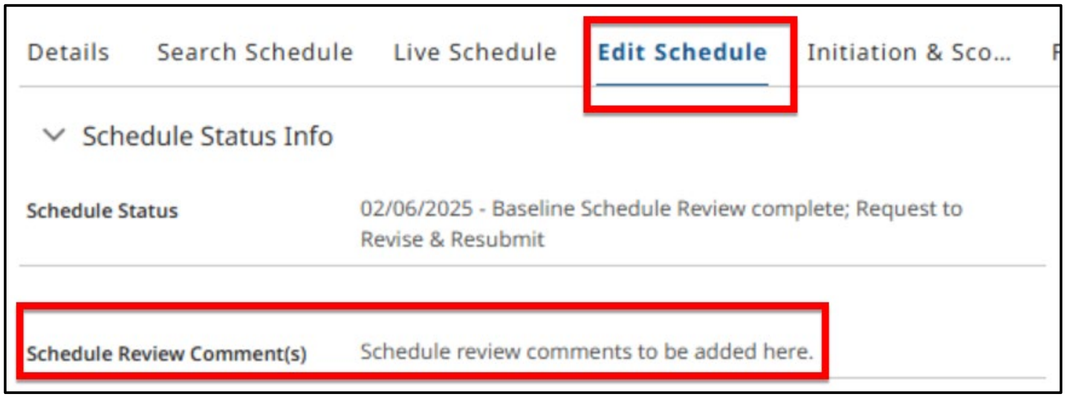
4.11.2 Schedule Update Sent Back for Revision

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.



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

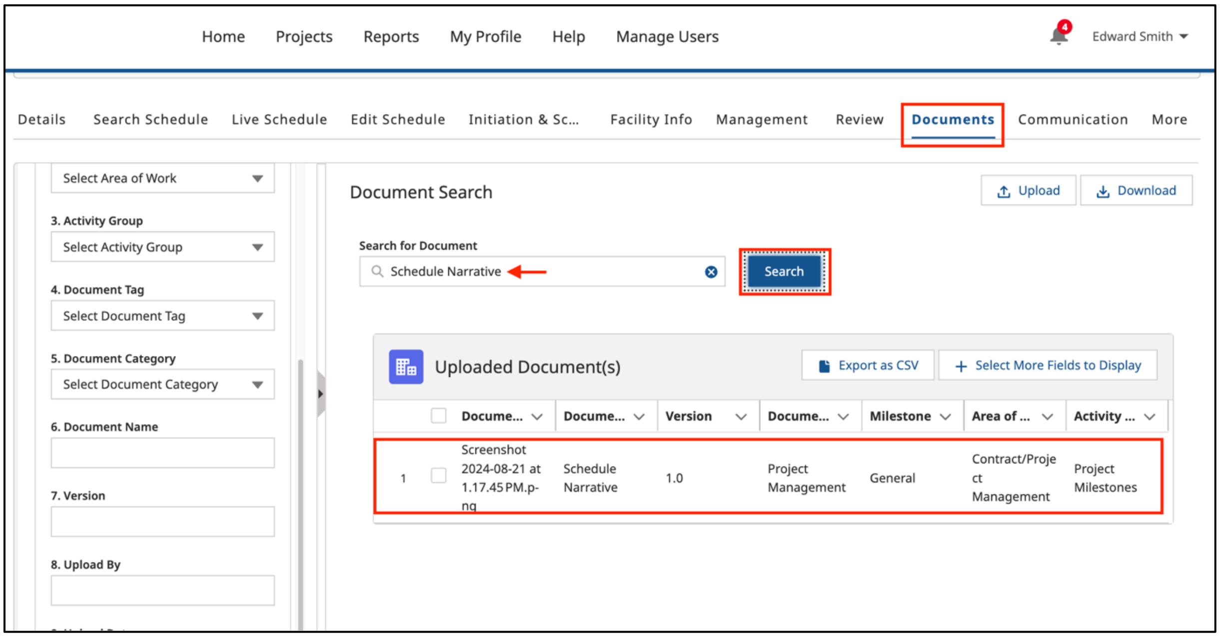
Users can search for documents using a basic search and Advanced Search features.

4.12.1.1 Basic Document Search

To search for a document with a Document Name:

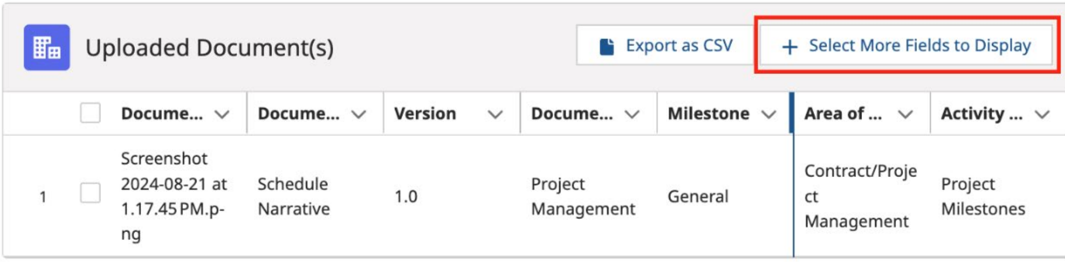
1. Go to the **Project** > **Documents** tab.
2. Enter the Document Name in the **Search for Document** field and click the **Search** button.

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



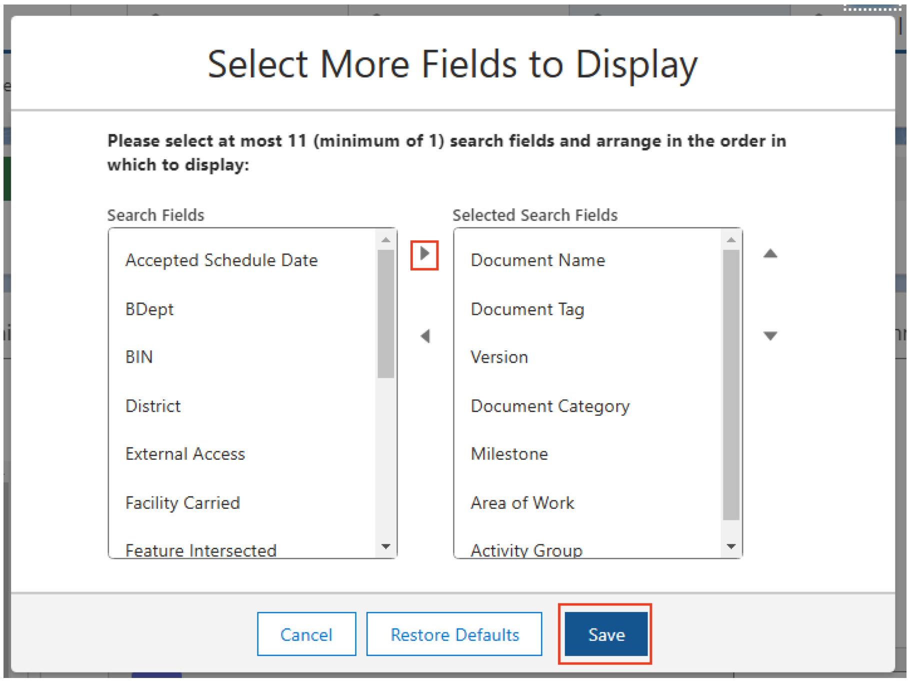
3. The **Uploaded Document(s)** section has default columns Document Name, Document Tag, Version, Document Category, Milestone, Area of Work, and Activity Group.

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



A **Select More Fields to Display** pop-up displays.

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



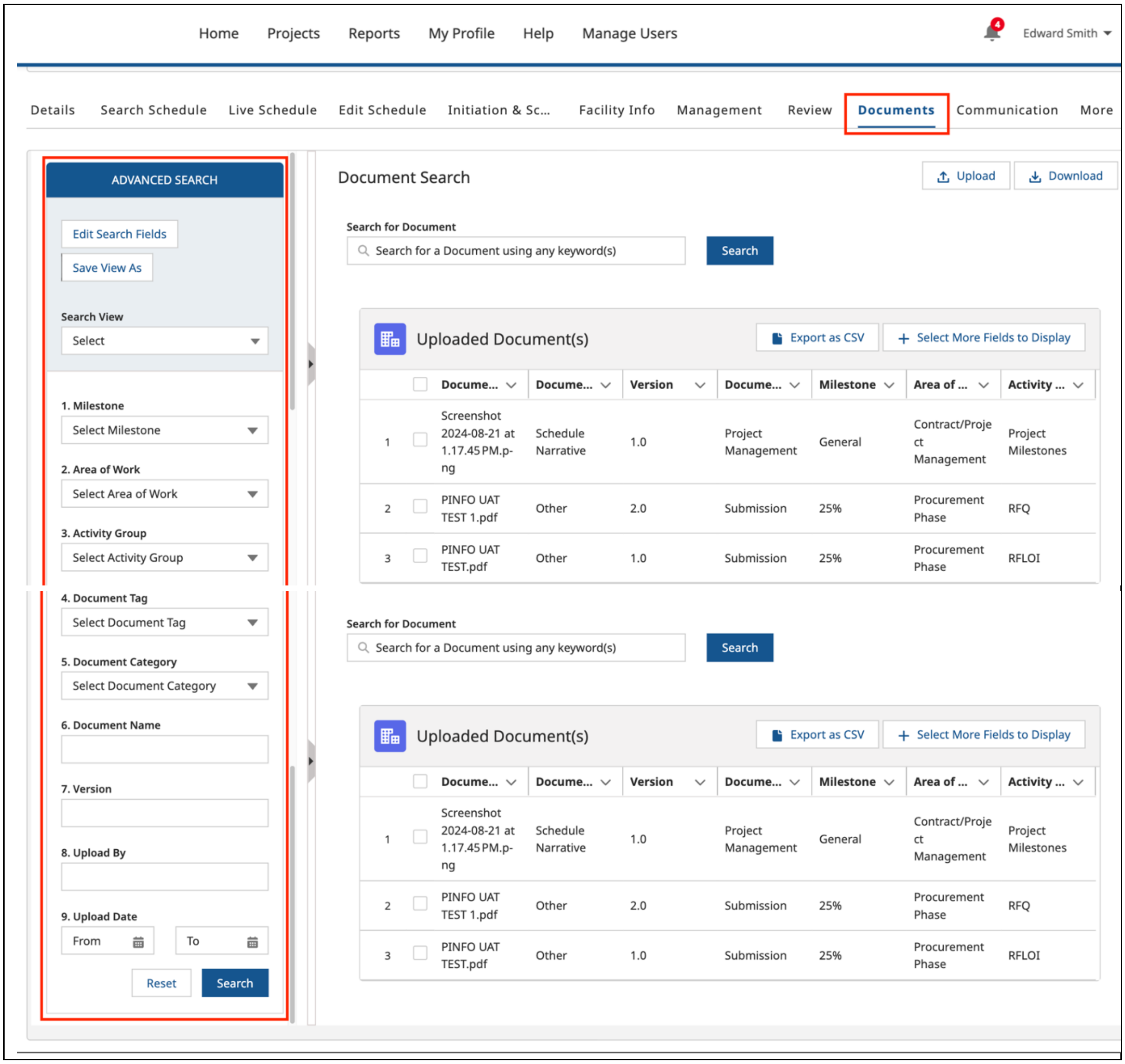
The user has the option to export the view of the results as a CSV file. Click **Export as CSV** to generate as needed**.**

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.



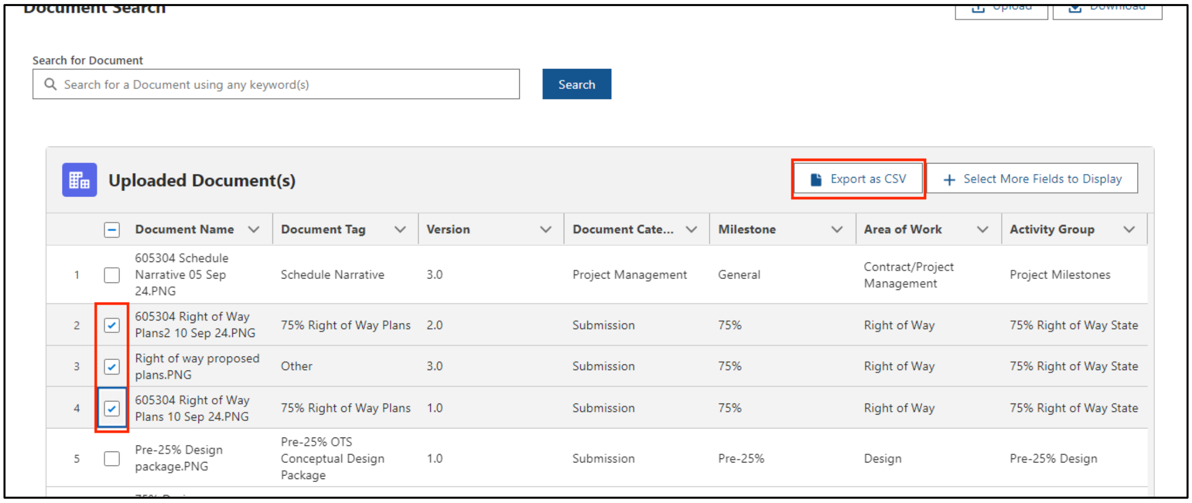
Export Documents as a Report

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:

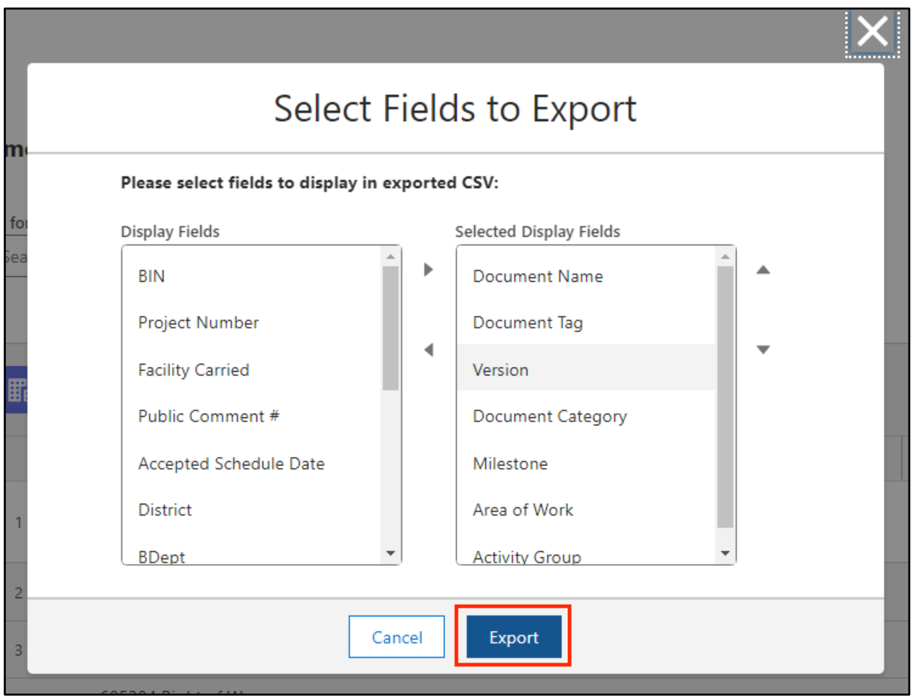
1. Select the checkbox against the required documents.

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



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

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



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 r**ight-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.

A1 Document Name

	A	B	C	D	E	F	G	H	I	J
1	Document Name	Document Tag	Version	Document	Milestone	Area of W	Activity Group			
2	605304 Schedule Narrative 05 Sep 24.PNG	Schedule Narrative	3	Project Ma	General	Contract/F	Project Milestones			
3	605304 Right of Way Plans2 10 Sep 24.PNG	75% Right of Way Plans	2	Submissic	75%	Right of W	75% Right of Way State			
4	Right of way proposed plans.PNG	Other	3	Submissic	75%	Right of W	75% Right of Way State			
5	605304 Right of Way Plans 10 Sep 24.PNG	75% Right of Way Plans	1	Submissic	75%	Right of W	75% Right of Way State			
6	Pre-25% Design package.PNG	Pre-25% OTS Conceptual I	1	Submissic	Pre-25%	Design	Pre-25% Design			
7	75% Design Package.PNG	75% Design Package	2	Submissic	75%	Design	75% Design Package			
8	Supporting Document.PNG	25% Design Package	2	Approval	25%	Design	25% Design Package			
9	25% Design package.PNG	25% Design Package	2	Approval	25%	Design	25% Design Package			
10	Impact Analysis.PNG	Historic/Archaeology - Fe	1	Review Co	25%	Environme	Historic / Archeology (Section 106) Review			
11	State Register Review.PNG	Historic/Archaeology - Fe	1	Review Co	25%	Environme	Historic / Archeology (Section 106) Review			
12	Public Notice.PNG	Pre-25% OTS Conceptual I	1	Submissic	25%	Design	Pre-25% Design			
13	Project Status Sheet Report (5).pdf	75% Design Package	1	Submissic	75%	Design	75% Design Package			
14	External.png	Schedule Narrative	2	Project Ma	General	Contract/F	Project Milestones			
15	Internal.png	Schedule Narrative	2	Project Ma	General	Contract/F	Project Milestones			
16	image001.png	Schedule Narrative	2	Project Ma	General	Contract/F	Project Milestones			
17	Screenshot 2024-08-21 at 1.17.45â€¯PM.png	Schedule Narrative	1	Project Ma	General	Contract/F	Project Milestones			
18	PINFO UAT TEST 1.pdf	Other	2	Submissic	25%	Procurem	RFQ			
19	PINFO UAT TEST.pdf	Other	1	Submissic	25%	Procurem	RFLOI			
20	sample test MSExcel.xlsx	DPH - Response to Public	1	Project Ma	25%	Design	Conduct 25% Design Public Hearing			
21	sample test MSWord document.docx	DPH - Public Comments	1	Project Ma	25%	Design	Conduct 25% Design Public Hearing			
22	123456 Markup Summary 6-12-2024.pdf	25% Design Package	1	Review Co	25%	Design	25% Design Package			

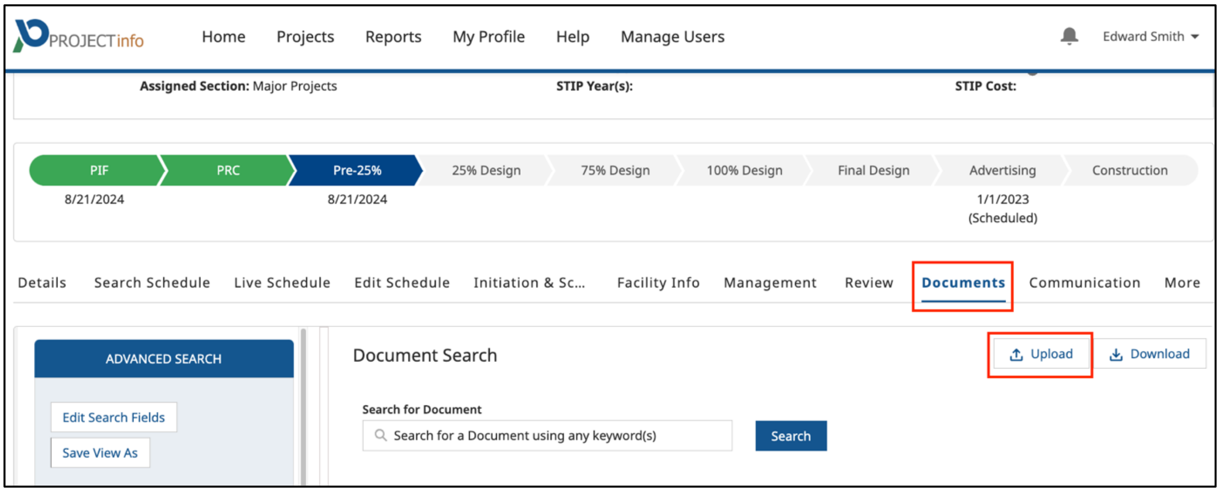
4.12.2 Uploading Documents

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

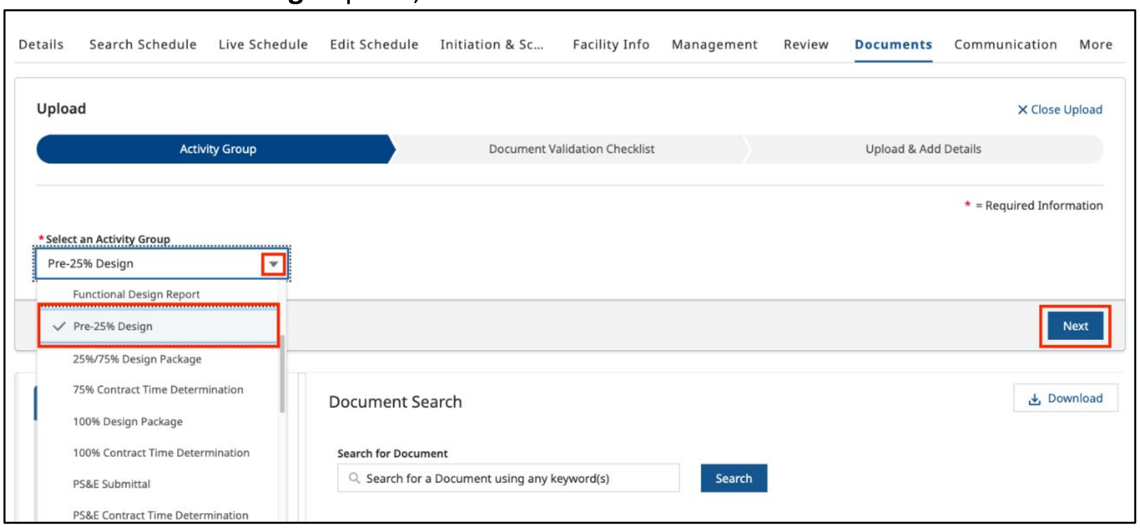
Note: For any errors in document tag selection or upload of document(s), please consult the Project Manager.

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

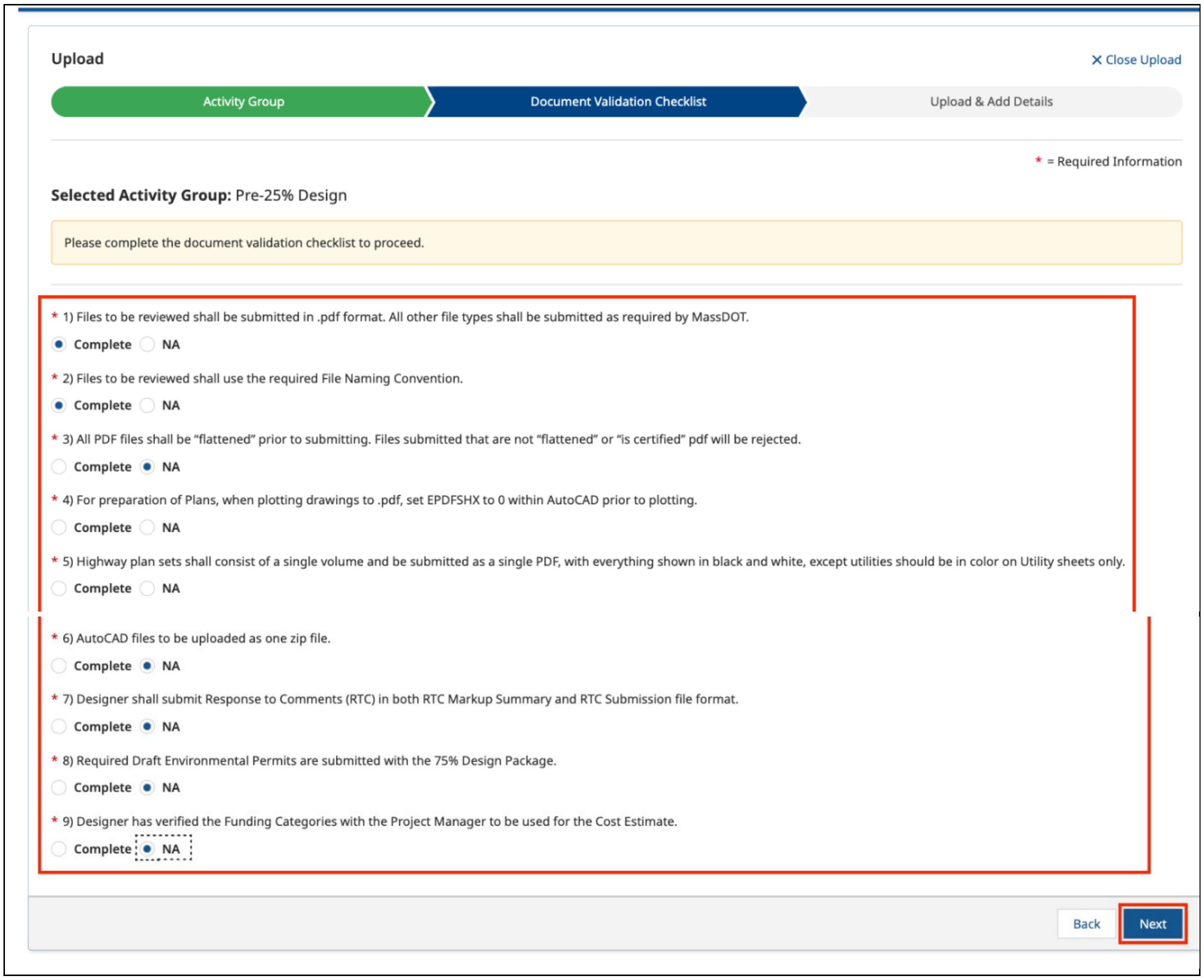
1. Go to the **Project** > **Documents**.
2. To upload the document, click the **Upload** button.



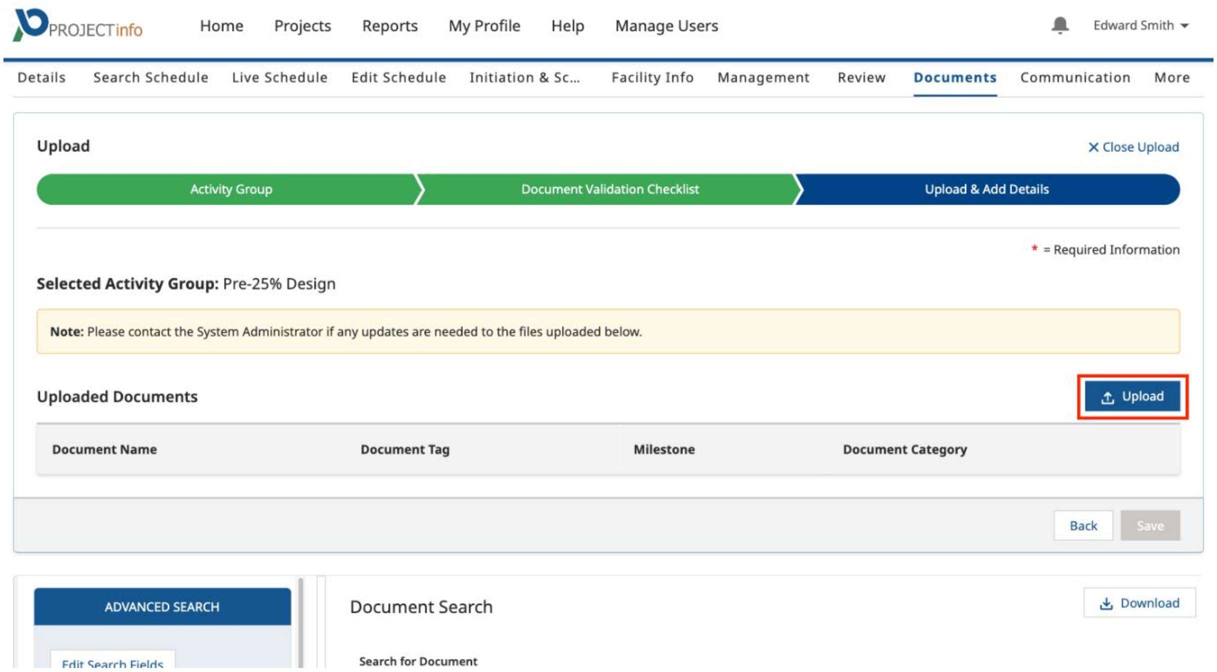
3. Under the Activity Group, click the **Select an Activity Group** down arrow, select the **Pre-25% Design** option, and click the **Next** button.



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



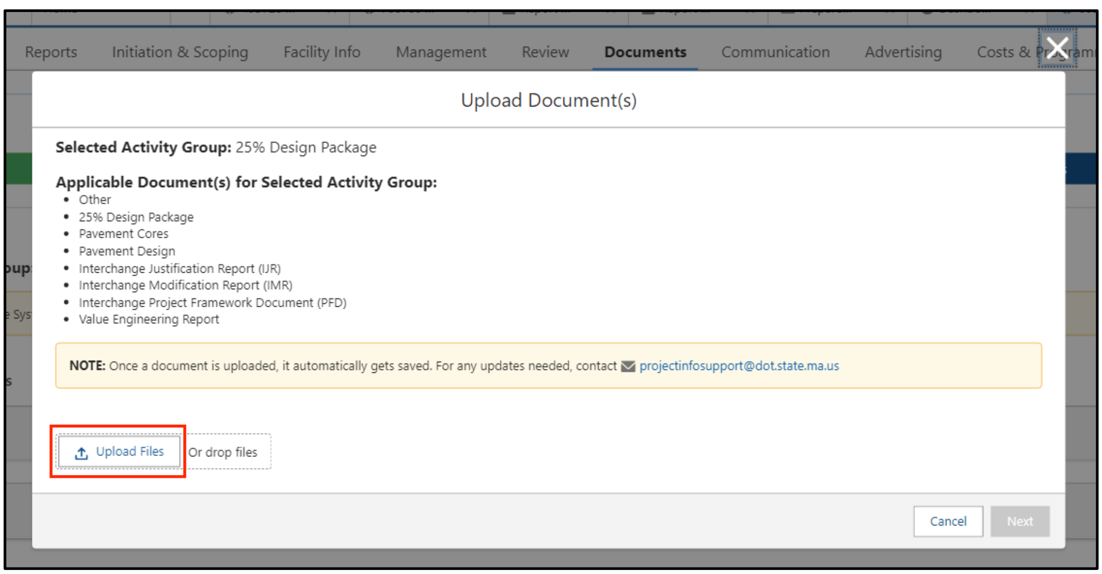
6. After clicking next the user advances to the **Upload & Add Details** chevron**.** Locate and click the **Upload** button.



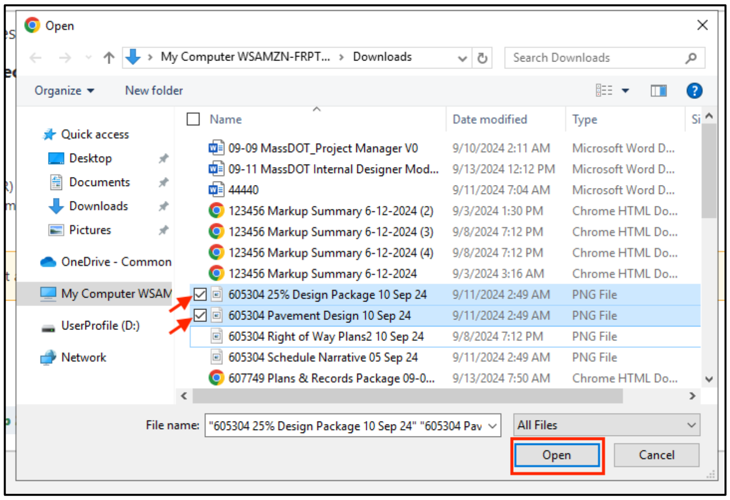
An **Upload Document(s)** pop-up displays.

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

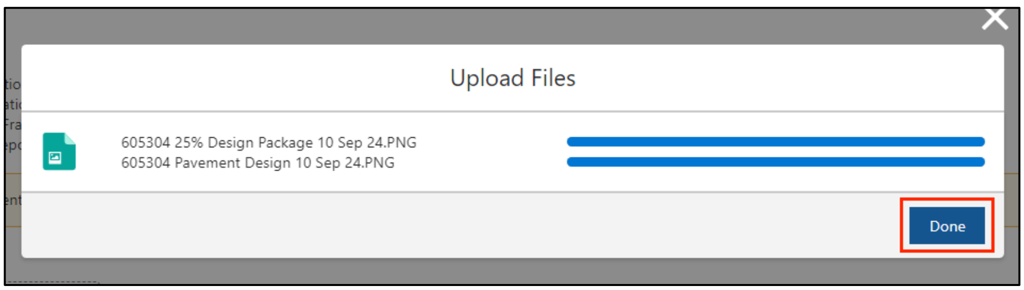
   Note: Users can upload multiple files.



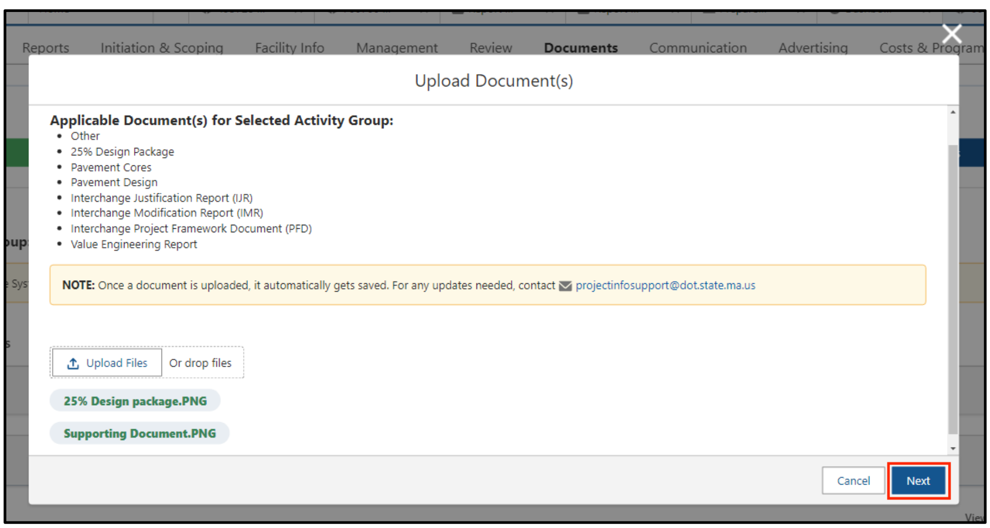
8. A File Explorer pop-up displays. Select the required document(s) and click the **Open** button.



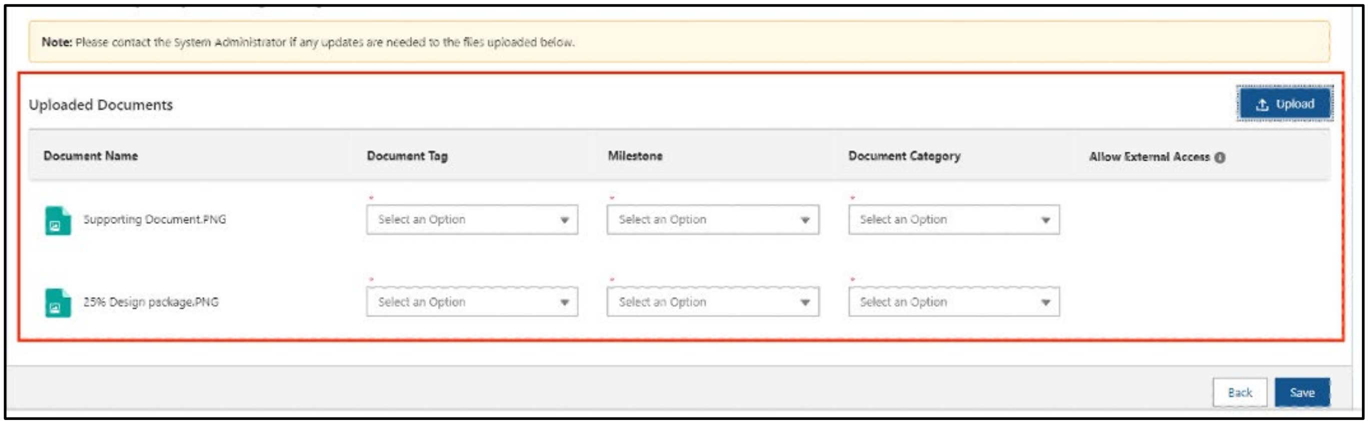
9. Once the document(s) are uploaded, click the **Done** button.



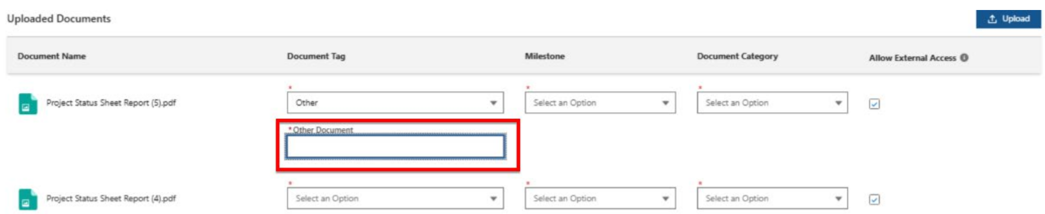
10. After uploading the required files, click **Next**.



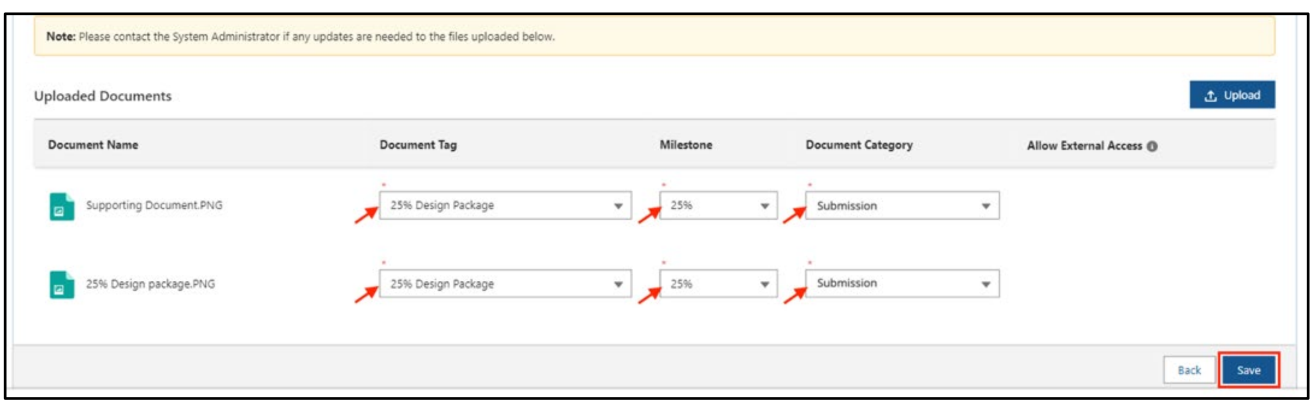
11. An **Uploaded Documents** section displays with the uploaded documents. For each Document, update the required details (Document Tag, Milestone and Document Category).



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



        (c)
13. Click the down arrow in the **Milestone** column and select the required option (For example, Pre-25%) from the dropdown.
    Note: The Milestone column will be auto populated based on the selected Activity Group but can still be edited manually.
14. Click the down arrow in the **Document Category** column and select the required option from the dropdown.
15. After performing the same action for each uploaded document, click the **Save** button.



The Uploaded documents will be displayed under the Documents tab.

Uploaded Document(s)

Export as CSV | + Select More Fields to Display

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

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

4.12.3 Previewing Documents

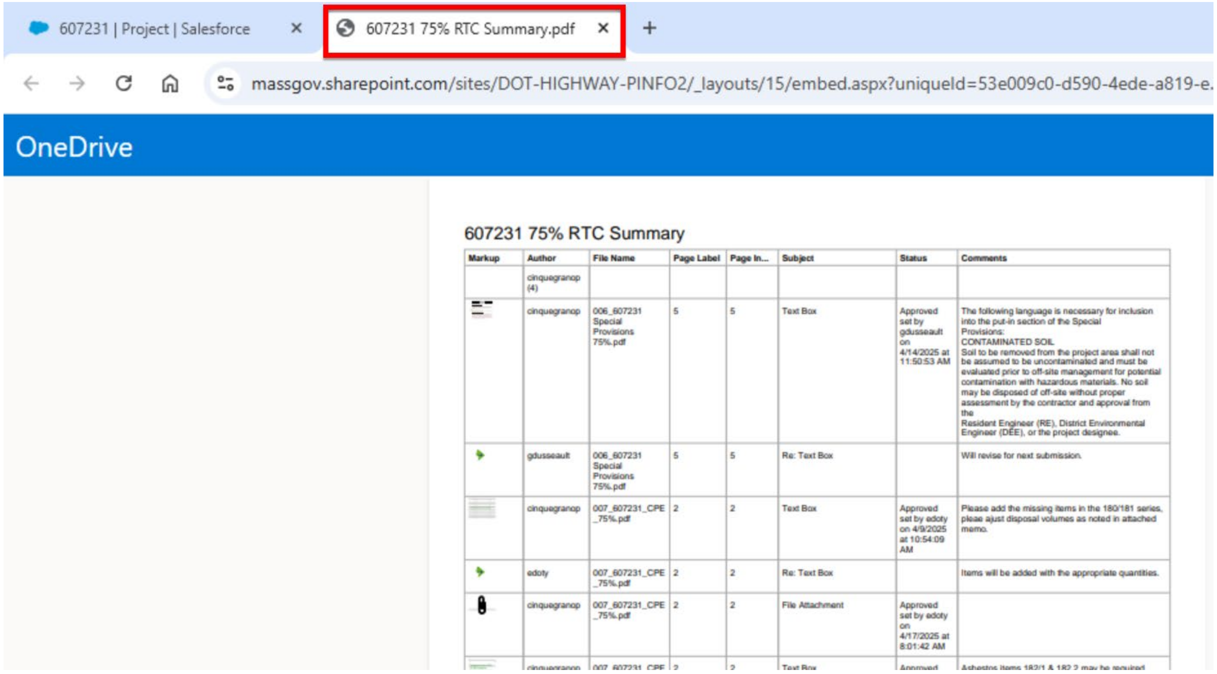
Users can see a preview of the documents from the Documents Tab by clicking on the Document Name Hyperlink.

Uploaded Document(s)

Edit Details | Export as CSV | + Select More Fields to Display

	Document ...	Docum...	Docum...	Milestone	Area of ...	Activity...	Upload Date	Upload ...
1	607231 75% RTC Summary.pdf	75% Design Package	Response to Comments	75%	Design	75% Design Package	6/4/2025	Greg Frazier
2	005_607231_H Sta and C	75% Design Package	Response to Comments	75%	Design	75% Design Package	6/4/2025	Greg Frazier

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

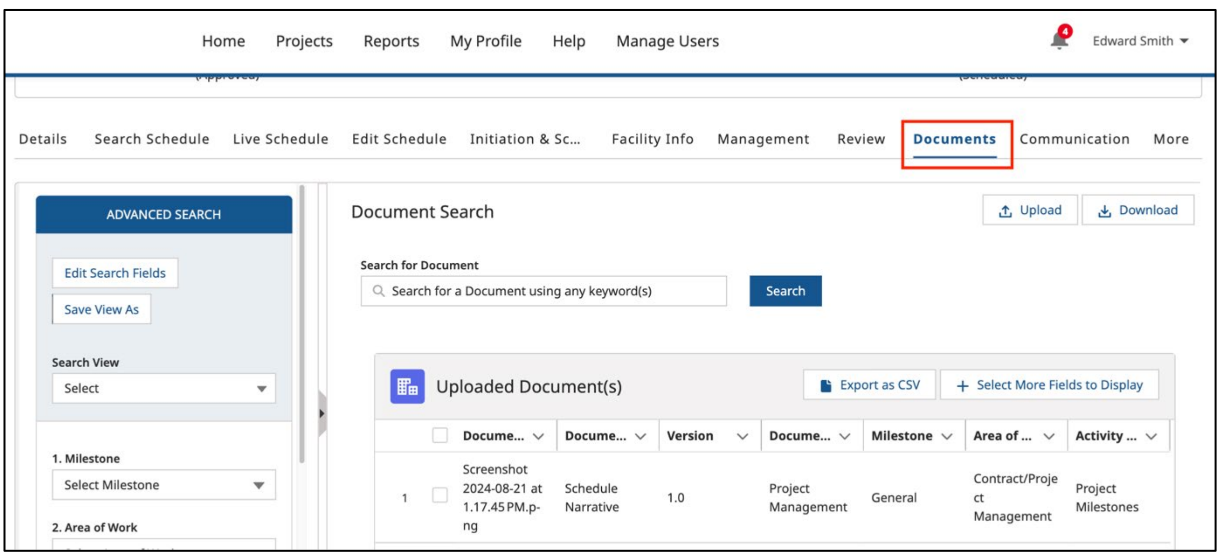


4.12.4 Downloading Documents

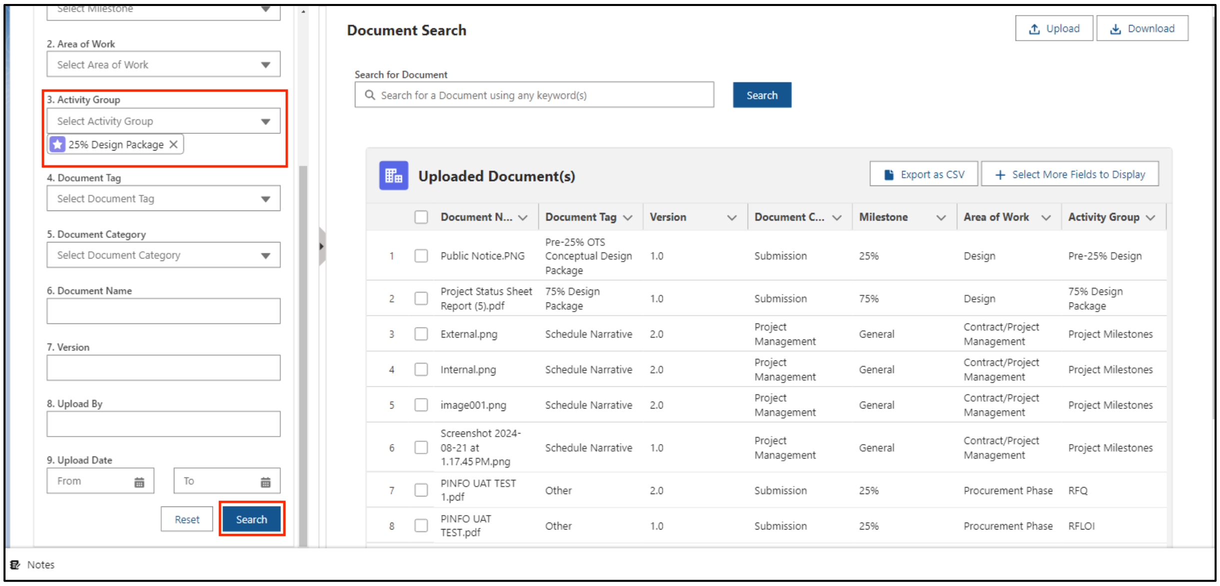
Users can download the documents from the Documents tab.

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

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

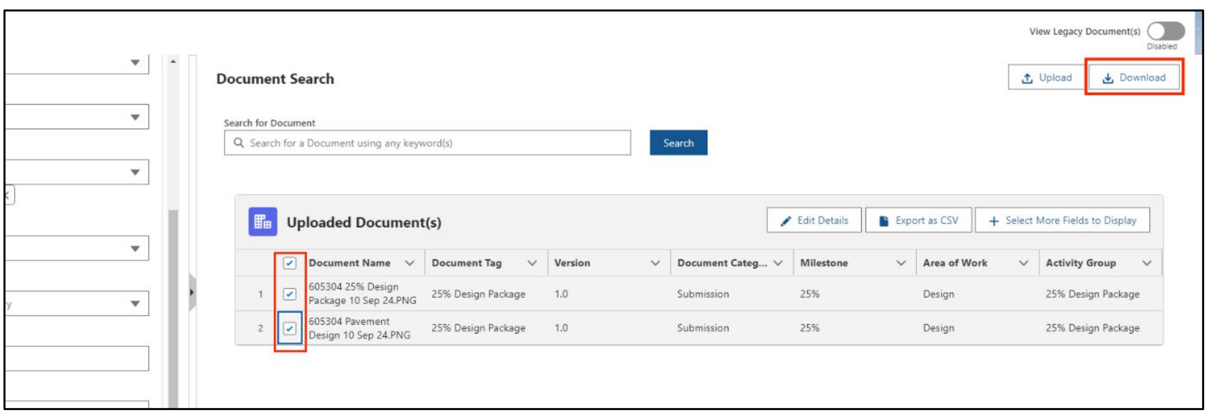


2. On the **Advanced Search** left panel, select the **Activity Group** as **25% Design Package** and click the **Search** button.

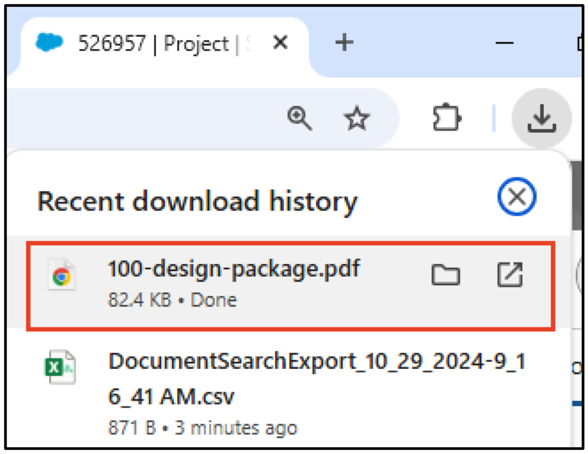


The list of documents within the selected activity group will be displayed under the **Uploaded Document(s)** section.

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



The Users can see the downloads on their local drive.



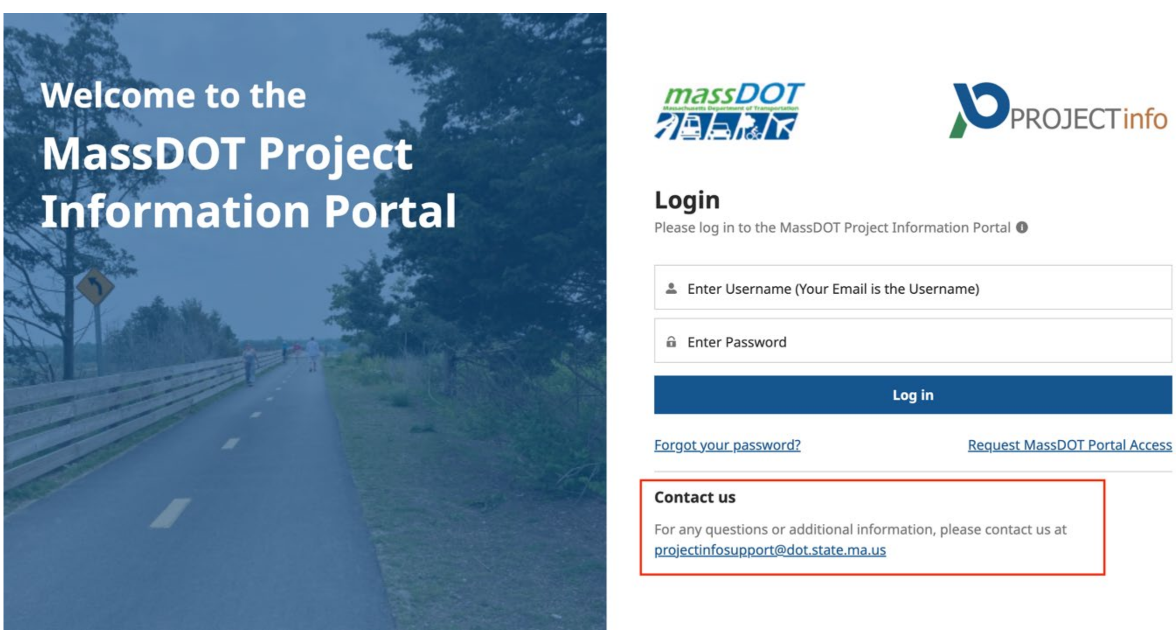
5 Support

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.



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

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

6.3 Table of Stickers

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

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